

Retirement Plans Worksheet

Retirement Plan Contributions

**** Be sure to bring year-end statements and Form 5498 for all your Retirement and tax deferred accounts.****

Yes

No

☐☐

Did you make any Retirement Plan Contributions?

You may be eligible for up to \$1,000 per person Federal tax credit for these contributions.

(Please provide amounts that are not listed on your W2)

<i>Account</i>	<i>Taxpayer</i>	<i>Spouse</i>
IRA	\$	\$
Roth	\$	\$
SEP/SIMPLE	\$	\$
401(k)/403(b)	\$	\$
PERA	\$	\$

Yes

No

☐☐

Are you planning to invest in an IRA, Roth IRA, SEP, or SIMPLE plan?

☐☐

If yes, would you like us to help you calculate the allowable contribution?

Retirement Plan Withdrawals

How many Forms 1099-R did you receive during the year? _____

Bring all Forms 1099-R to your appointment, including Forms 1099-R received for:

- Withdrawals from retirement or tax deferred plans
- Direct distributions from a qualified retirement account to a charitable organization
- Roth IRA Conversions
- Rollovers or transfers
- 1035 Exchanges

Long-Term Care Insurance Credit

Minnesota tax credit for premiums paid for Qualified Long-Term Care Insurance. Please Provide the following information to help us determine your credit. If your policy is not tax qualified, you are not eligible for the credit and do not need to complete this section.

Tax payer

Spouse

Name of Insurance Company

Policy Number

Total Premiums Paid

\$ _____

\$ _____

You must complete all this information each year. Insurance companies are sold all the time and your account numbers may change.