

Please enter all pertinent 2022 information. Last year's amounts are provided for your reference.

**TRADITIONAL IRA CONTRIBUTIONS**

|   | 2022 Amount |        | 2021 Amount |        |
|---|-------------|--------|-------------|--------|
|   | Taxpayer    | Spouse | Taxpayer    | Spouse |
| IRA contributions you made or expect to make (1=maximum) (\$6,000/\$7,000 if 50 or older) ..... | 1           | 51     |             |        |
| Contributions made to date .....  | 3           | 53     |             |        |
| 1=covered by plan, 2=not covered .....  | 5           | 55     |             |        |
| 2022 payments from 1/1/23 to 4/15/23 .....  | 8           | 58     |             |        |

**ROTH IRA CONTRIBUTIONS**

|  |    |    |  |  |
|--|----|----|--|--|
| Roth IRA contributions you made or expect to make (1=maximum) (\$6,000/\$7,000 if 50 or older) ..... | 27 | 77 |  |  |
| Contributions made to date .....   | 30 | 80 |  |  |

**SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)**

|   |     |     |  |  |
|---|-----|-----|--|--|
| Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum) .....    | 10  | 60  |  |  |
| Money purchase (25%/1.25) contributions you made or expect to make (1=maximum) .....    | 11  | 61  |  |  |
| Defined benefit contributions you expect to make .....                                  | 13  | 63  |  |  |
| Self-employed SEP (25%/1.25) contributions you made or expect to make (1=maximum) ..... | 12  | 62  |  |  |
| Plan contribution rate if not .25 (.xxxx) .....   | 501 | 551 |  |  |
| Individual 401k: SE elective deferrals (except Roth) (1=max.) .....                     | 44  | 94  |  |  |
| Individual 401k: SE designated Roth contributions (1=max.) .....                        | 144 | 194 |  |  |

**SIMPLE contributions:**

|   |     |     |  |  |
|---|-----|-----|--|--|
| Self-employed SIMPLE contributions you made or expect to make (1=maximum) ..... | 22  | 72  |  |  |
| Employer matching rate if not .03 (.xxxx) .....                                 | 502 | 552 |  |  |
| 1=nonelective contributions (2%) .....  | 24  | 74  |  |  |
| Contributions made to date .....  | 14  | 64  |  |  |

**ADJUSTMENTS TO INCOME**

|  |    |    |  |  |
|--|----|----|--|--|
| Self-employed health insurance:                      |    |    |  |  |
| Total premiums (excluding long-term care) .....      | 16 | 66 |  |  |
| Long-term care premiums .....                        | 26 | 76 |  |  |
| Student loan interest paid (1098-E, box 1) .....     | 23 | 73 |  |  |
| Educator expenses (kindergarten thru grade 12) ..... | 28 | 78 |  |  |
| Jury duty pay given to employer .....                | 43 | 93 |  |  |
| Expenses from rental of personal property .....      | 37 | 87 |  |  |
| Other adjustments to income:                         |    |    |  |  |
| _____  | 19 | 69 |  |  |
| _____  | 19 | 69 |  |  |
| _____  | 19 | 69 |  |  |

**Alimony paid:**

|   | Taxpayer | Spouse   |
|---|----------|----------|
| Date of divorce or sep. agreement ..... | 102.____ | 103.____ |
| Recipient's first name .....            | 39.____  | 89.____  |
| Recipient's last name .....             | 40.____  | 90.____  |
| Recipient's SSN .....                   | 41.____  | 91.____  |
| Amount paid .....                       | 18.____  | 68.____  |