# PENSIONS, IRAS, LUMP-SUM DISTRIBUTIONS, GAMBLING

Please enclose copies of ALL 2008 1099R and W2G forms

| Taxpayer Spouse | Name of payer | 2007 Total | 2008 Total | Taxable amount | Federal withheld | State | State taxable | State withheld | I - IRA<br>D - Disabled<br>P - Pension<br>O - Other |
|---|---|---|---|---|---|---|---|---|---|
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## ESTIMATED TAX PAYMENTS

| Taxpayer Spouse Joint | 2007 REFUND APPLIED TO 2008 | 1ST PAYMENT | | 2ND PAYMENT | | 3RD PAYMENT | | 4TH PAYMENT | |
|---|---|---|---|---|---|---|---|---|---|
| | | Date Paid | Amount | Date Paid | Amount | Date Paid | Amount | Date Paid | Amount |
| Federal | | | | | | | | | |
| State | | | | | | | | | |
| Other | | | | | | | | | |

| OTHER INCOME | TAXPAYER 2007 | TAXPAYER 2008 | SPOUSE 2007 | SPOUSE 2008 |
|---|---|---|---|---|
| State Refund | | | | |
| Unemployment received | | | | |
| Federal withheld | | | | |
| State withheld | | | | |
| Railroad unemployment received | | | | |
| Railroad retirement tier 1 received | | | | |
| Social security received on SSA-1099 box 5 | | | | |
| Medicare premiums withheld | | | | |
| Alimony received | | | | |
| Other income | | | | |
| **ADJUSTMENTS TO INCOME** | | | | |
| IRA contribution | | | | |
| Self-employed health insurance | | | | |
| Keogh/SEP contribution | | | | |
| Early withdrawal penalty (interest forfeiture) | | | | |
| Alimony paid | | | | |
| Student loan interest | | | | |
| Moving expense | | | | |
| Other adjustments to income | | | | |


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