IRA, Pension, Annuity and Retirement Plan Information

Individual Retirement Account (IRA):

TS . . . . ____

Name of payer . . . . ____

IRA Questions for 2009:

	Yes	No
Are you covered by an employer's retirement plan?		
If no, is your spouse covered by an employer's retirement plan?		
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?		
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify *for an IRA deduction?*		
Did you receive distributions in 2009 from a traditional IRA, Roth IRA or Qualified Education Account?		
Did you convert a traditional IRA to a Roth IRA in 2009?		
Did you use your IRA as security for a loan this year?		
Did you have any transactions with your IRA during the year?		

If Yes, please explain. ____

IRA Values, Rollovers, and Distributions: **Please enclose copies of all Forms 1099-R**

Total value of all traditional IRAs on December 31, 2009	
Outstanding rollovers on December 31, 2009	
IRA distributions received during 2009	
Total distributions converted to Roth IRAs	
Amount of *Qualified Disaster Recovery Assistance* distributions	

Contributions: **Please enclose copies of all Forms 5498**

IRA:

Contributions in 2009 for the 2009 tax return	
Contributions in 2010 for the 2009 tax return	
Amount for 2009 you choose to be treated as nondeductible	

Roth IRA:

Contributions made for the 2009 tax year	

Pensions and Annuities: **Please enclose all Forms 1099-R and any nontaxable distribution details**

TSJ	Name of Payer	2009 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	Is this a IRA?	2008 Gross Distributions

Self-Employed Retirement Plan: **Please enclose copies of all Forms 1099-R**

	Taxpayer Yes	Taxpayer No	Spouse Yes	Spouse No
Have you established a self-employed retirement or SIMPLE plan with deductible contributions?				
Do you wish to contribute the maximum amount allowed?				

Contributions to:

	Taxpayer 2009 Amount	Spouse *2009 Amount*
Simplified employee pension plan		
Defined benefit plan		
Defined contribution plan		
SIMPLE plan		