

PENSION AND RETIREMENT INCOME

2020
(1099R)

PENSIONS AND IRAS

Listed below are your pension, IRA distributions, and Social Security received last year (if any).

Name of payer _____
 Street address _____
 City, State, Zip Code _____
 Employer Identification Number _____

TAXPAYER SPOUSE IRA

Name of payer _____
 Street address _____
 City, State, Zip Code _____
 Employer Identification Number _____

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TAXPAYER SPOUSE IRA

* Please include any 1099's and other 2020 information.

If you ever made non-deductible contributions to your IRA, please provide year-end balances of all your IRA accounts.

SOCIAL SECURITY BENEFITS

(1040 WKT)

2020 AMOUNTS

2019 TOTAL AMOUNT

Taxpayer Amount \$ _____

Spouse Amount \$ _____