

**PENSION AND RETIREMENT INCOME**

**2024  
(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 \_\_\_\_\_

TAXPAYER                       SPOUSE                       IRA

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 \_\_\_\_\_

TAXPAYER                       SPOUSE                       IRA

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 \_\_\_\_\_

TAXPAYER                       SPOUSE                       IRA

\* Please include any 1099's and other 2023 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)**

**2024 AMOUNTS**

**2023 TOTAL AMOUNT**

Taxpayer Amount                      \$ \_\_\_\_\_

Spouse Amount                      \$ \_\_\_\_\_