

RETIRED PENSIONER TAX RETURN WORKSHEET

Annual Income & Tax Declaration Template

TAX YEAR:

1. PERSONAL IDENTIFICATION

Full Name:

Tax Identification / SSN:

Date of Birth:

Spouse Name (if joint):

Spouse Tax ID / SSN:

Date of Retirement:

Residential Address:

2. RETIREMENT INCOME SOURCES

INCOME SOURCE DESCRIPTION	GROSS AMOUNT RECEIVED	TAX WITHHELD / DEDUCTED
State / Social Security Pension		
Occupational / Employer Pension		
Private Annuity Distributions		
IRA / Retirement Fund Withdrawals		
Investment Interest & Dividends		
Other Taxable Retirement Benefits		
Total Annual Income:		

3. DEDUCTIONS & SENIOR ALLOWANCES

DEDUCTION / ALLOWANCE CATEGORY	APPLICABLE AMOUNT
Standard Senior Age Allowance / Exemption	
Out-of-Pocket Medical & Healthcare Expenses	
Allowable Charitable Contributions	

DEDUCTION / ALLOWANCE CATEGORY	APPLICABLE AMOUNT
Other Deductions (e.g., Qualified Property Taxes)	
Total Deductions & Allowances:	

4. TAX CALCULATION SUMMARY

A. Total Income (from Sec 2):

B. Less Deductions (from Sec 3):

C. Net Taxable Income (A minus B):

D. Calculated Annual Tax Liability:

E. Less Tax Already Withheld:

F. Net Tax Due / (Refund Claim):

5. DECLARATION AND SIGNATURE

I declare under penalties of perjury that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Primary Taxpayer Signature:

Spouse Signature (if filing jointly):

Date:

Date:

This document is a standardized calculation worksheet for retired individuals and pensioners. Please retain all official pension statements, certificate forms, and expense receipts for audit verification purposes.