

RETIREMENT INCOME RETURN

Declaration of Income and Pension Details for the Financial Year

1. PERSONAL INFORMATION

FULL NAME

TAX IDENTIFICATION / SOCIAL SECURITY NUMBER

DATE OF BIRTH

DATE OF RETIREMENT

RESIDENTIAL ADDRESS

PHONE NUMBER

EMAIL ADDRESS

2. RETIREMENT INCOME SOURCES

INCOME CATEGORY	ANNUAL AMOUNT (GROSS)
Government / State Pension	
Employer / Occupational Pension	
Annuity Distributions	
Retirement Savings Account (IRA, 401k, etc.) Withdrawals	
Interest and Dividends from Investments	
Rental / Property Income	
Other Income (Foreign pension, trust, allowances)	
Total Gross Retirement Income	

3. DEDUCTIONS & ALLOWABLE RELIEFS

DEDUCTION TYPE	AMOUNT CLAIMED
Senior Citizen Tax Relief / Age Allowance	
Medical Insurance & Healthcare Expenses	

DEDUCTION TYPE	AMOUNT CLAIMED
Charitable Donations / Giving	
Other Deductions	
Total Deductions	

4. TAX SUMMARY

Net Taxable Income (Total Gross Income less Total Deductions)	
Tax Already Withheld / Paid at Source	

5. DECLARATION

I hereby declare that the information given in this return is true, correct, and complete to the best of my knowledge and belief, and that I have disclosed all sources of retirement income received during this financial year.

SIGNATURE OF DECLARANT

DATE