

RETIREMENT TAX DECLARATION

Annual Tax Return Template for Retired Individuals

1. PERSONAL INFORMATION

FULL NAME

TAX IDENTIFICATION NUMBER

DATE OF BIRTH

RETIREMENT DATE

TAX ASSESSMENT YEAR

RESIDENTIAL ADDRESS

TELEPHONE / EMAIL

2. SOURCES OF RETIREMENT INCOME

Income Category	Annual Gross Amount
Government Pension / Social Security Benefits	
Occupational / Private Pension Scheme Distributions	
Annuity Payments	
Individual Retirement Account (IRA) / 401(k) Withdrawals	
Investment Income (Dividends, Interest, Capital Gains)	
Rental Income or Other Source Income	
Total Retirement Income	

3. DEDUCTIONS, ALLOWANCES & TAX RELIEFS

Eligible Expenses & Reliefs	Claimed Amount
Senior Citizen Standard Deduction / Personal Allowance	
Medical and Healthcare Expenses (Non-reimbursed)	
Health Insurance Premiums	

Eligible Expenses & Reliefs	Claimed Amount
Charitable Donations / Contributions	
Total Claimed Deductions	

4. DECLARATION

I hereby declare that the information provided in this retirement tax return template is true, correct, and complete to the best of my knowledge and belief. I understand that any false statements or omission of material facts may result in legal penalties under the applicable taxation laws.

SIGNATURE OF DECLARANT

DATE
