ANNUAL TAX RETURN SHEET

Retired Individual Filing

TAX YEAR: ________

1. PERSONAL INFORMATION

Full Name:

Tax Identification / SSN:

Spouse Name (if joint):

Spouse SSN (if joint):

Street Address:

Contact Number:

Filing Status:

- ☐ Single
- ☐ Married Filing Jointly
- ☐ Married Filing Separately
- ☐ Head of Household
- ☐ Qualifying Surviving Spouse

2. RETIREMENT & PENSION INCOME

Income Source Category	Gross Annual Amount
Social Security Benefits (Form SSA-1099)	
Pensions and Annuities (Form 1099-R)	
Traditional IRA Distributions	
Roth IRA Distributions (Qualified / Non-taxable)	
Interest and Dividend Income (Schedule B)	
Required Minimum Distributions (RMDs)	
Other Taxable Income (Capital Gains, Rental, etc.)	
Total Gross Retirement Income:	

3. SENIOR DEDUCTIONS & QUALIFIED EXPENSES

Allowable Deductions / Credits	Amount claimed
Standard Deduction (Includes Senior 65+ Additional Amount)	
Unreimbursed Medical & Dental Expenses (Schedule A threshold)	
Qualified Charitable Distributions (QCDs) directly from IRA	
State/Local Property Taxes paid	
Total Deductions:	

4. TAX CALCULATION SUMMARY

A. Taxable Income (Gross Income minus Deductions)	
B. Total Calculated Tax Liability	
C. Federal/State Income Tax Withheld (From 1099s/W-2s)	
D. Estimated Quarterly Tax Payments Paid	
Refund Due (If C + D is greater than B):	
Amount Owed (If B is greater than C + D):	

Taxpayer Signature

Date

Spouse Signature (if filing jointly)

Date

Under penalties of perjury, I declare 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. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.