

Other Income and Adjustments

Name: _____

SSN: _____

Other Income

Did you receive, sell, exchange, or otherwise acquire any financial interest in any virtual currency at any time during 2019?

	2019 Taxpayer	2018 Taxpayer	2019 Spouse	2018 Spouse
Scholarships or grants not reported on Form W-2	_____	_____	_____	_____
State income tax refund (attach Forms 1099-G)	_____	_____	_____	_____
Social Security Benefits (attach Forms 1099-SSA)	_____	_____	_____	_____
Railroad Retirement Benefits (attach Forms 1099-RRB)	_____	_____	_____	_____
Alimony received				
Divorce or separation date _____ Amount _____	_____	_____	_____	_____
Unemployment compensation (attach Forms 1099-G)	_____	_____	_____	_____
Unemployment compensation repaid in 2019	_____	_____	_____	_____
Gambling winnings (attach Forms W2-G)	_____	_____	_____	_____
Alaska Permanent Fund	_____	_____	_____	_____
ABLE distributions	_____	_____	_____	_____
Other income: _____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Adjustments

	2019 Taxpayer	2018 Taxpayer	2019 Spouse	2018 Spouse
Educator expenses (If you are an educator, enter the amount you paid for classroom supplies)	_____	_____	_____	_____
Contributions made to a Health Savings Account (HSA)	_____	_____	_____	_____
Contributions made to a Self-Employed Pension plan (SEP)	_____	_____	_____	_____
Payments made for Self-Employed Health Insurance for you, your spouse, or dependents	_____	_____	_____	_____
Alimony paid				
Name _____				
SSN _____ Divorce or separation date _____	_____	_____	_____	_____
Name _____				
SSN _____ Divorce or separation date _____	_____	_____	_____	_____
Contributions made to an Individual Retirement Account (IRA)	_____	_____	_____	_____
Contributions made to a Roth IRA	_____	_____	_____	_____
Interest paid on a student loan	_____	_____	_____	_____
Other adjustments: _____	_____	_____	_____	_____

Adjustments

Name: _____

SSN: _____

Moving Expenses

TSJ _____

Select this box and complete the fields below if you are a member of the Armed Forces on active duty, and moved due to a military order for a permanent change of station.

2019

2018

Enter the number of miles from your OLD home to your NEW workplace _____

Enter the number of miles from your OLD home to your OLD workplace _____

Enter the amount you paid for transportation and storage of household goods and personal effects _____

Enter the amount you paid for travel and lodging expenses incurred during the move (do NOT include meals) _____

Enter the amount of moving expenses reimbursed to you by your employer _____

Self-Employed Health Insurance

TSJ _____

2019

2018

Enter the qualified long term care amount _____

Enter your Medicare wages from an S corporation _____

Self-Employed Pensions

TSJ _____

2019

2018

Enter your plan contribution rate as a decimal _____

Enter your allowable elective deferrals made during 2019 _____

Enter your catch-up contributions _____

Enter the amount of designated ROTH contributions included above _____

Nondeductible IRAs

TS _____

2019

2018

Total traditional IRA contributions made for 2019 _____

Total basis in traditional IRAs as of 12/31/2019 _____

Distributions you received from traditional, SEP, and Simple IRAs. (Do not include rollovers) _____

Amount of traditional IRAs converted to ROTH IRAs _____

IRA basis before conversion _____

Total ROTH IRA contributions made for 2019 _____

Health Savings Account

TSJ _____

2019

2018

HSA contributions made for 2019 _____

Total distributions from all HSAs during 2019 _____

Distributions included above that were rolled over into another account _____

Qualified medical expenses paid using HSA distributions _____