

Client Intake Questionnaire Pension & IRA Information

Complete Section A below if either you or your spouse is receiving a pension other than Social Security.

A. <u>Pensions & Annuities.</u>	<u>Taxpayer</u>		<u>Spouse</u>	
• Your current age?.....				
• What was the starting date of your pension?.....				
• How old were you when you first began receiving pension payments?.....				
• Did you contribute to the cost of your pension before you retired? (That is, was part of the total contributions to your retirement plan paid by you with after-tax earnings?).....	Yes	No	Yes	No
• Was part or all of what you received this year a partial or total lump distribution from a qualified retirement plan?.....	Yes	No	Yes	No

Complete Section B below if either you or your spouse is over age 70 ½.

B. <u>Minimum Distributions.</u>				
• Are you entitled to any distributions from a qualified employee retirement plan that you have NOT yet begun to receive?.....	Yes	No	Yes	No
• Do you have an IRA from which you have NOT yet begun to take any distributions?.....	Yes	No	Yes	No

Complete Section C below if either you or your spouse contributed to (or plan to contribute to) an IRA, or received any distributions from an IRA this year?

C. <u>IRAs</u>				
• Your current age?.....				
• How much have you or will you contribute for the current year? (Include amounts for the period January 1, 2004 thru April 15, 2004).....				
• Will this be a contribution to a Roth or to a Traditional IRA?.....	Roth	Trad	Roth	Trad
• How much have you received from your IRA from January 1, 2003 thru December 31, 2003?.....				

- Was this a distribution from a Roth or from a Traditional IRA?.....

Roth	Trad	Roth	Trad
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Complete Section D below if either you or your spouse contributed to ANY type of tax deferred retirement plan including IRAs or employer-sponsored plans such as a 401k this year AND your income was less than \$50,000 MFJ, \$37,500 HH or \$25,000 S.

D. Saver's Credit

- Have you received any distributions from IRAs or qualified retirements plans for the following periods:
 From January 1, 2004 thru April 15, 2004. If so, how much?.....
 From January 1, 2000 thru December 31, 2003. If so, how much?.....

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