

Annuity/Pension Exclusion Calculator

(version 10.17, 11/01/2018)

Taxpayer's name and pension type for tax year 2018 ▼	<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">CARL EVANS</div> <input type="checkbox"/> Check if a public safety officer pension (?) <input type="checkbox"/> Check if a disability pension (?)	
	Enter dates as MM/DD/YYYY	Age at annuity start
Annuity start date	01/01/2014	
Annuitant's birthdate <input type="checkbox"/> Died in 2018	07/08/1945	68
Spouse's birthdate		Not used
Combined age for survivor annuity	(For joint or survivor annuity)	Not used
Gross distribution (<input type="checkbox"/> Check if RRB1099-R)	12743	
Total annuity contributions	7985	
Exclusion months in 1st year	12	
Total months to be excluded	210	
Monthly exclusion	38.02	
First year exclusion	456	
Exclusion for remaining years	456	
Final year exclusion (2031)	233	

Federal Section > Income > IRA/Pension Distributions/1099-R or RRB-1099-R:

Form 1099-R 1 Gross Distribution 12743 2a Taxable Amount 12287 9b Total employee contributions 7985	<div style="border: 2px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;">Simplified General Rule Worksheet</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Gross distribution amount (from 1099-R)</td> <td style="text-align: right;">12743</td> </tr> <tr> <td>Plan cost at annuity start date</td> <td style="text-align: right;">7985</td> </tr> <tr> <td>Starting date of annuity</td> <td style="text-align: right;">01/01/2014</td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Check here if this is a Joint or Survivor Annuity</td> </tr> <tr> <td>Death benefit exclusion</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Age of recipient at start date</td> <td style="text-align: right;">68</td> </tr> <tr> <td>Number of months paid in 2018</td> <td style="text-align: right;">12</td> </tr> <tr> <td>Amounts previously recovered</td> <td style="text-align: right;">1824</td> </tr> </table> </div>	Gross distribution amount (from 1099-R)	12743	Plan cost at annuity start date	7985	Starting date of annuity	01/01/2014	<input type="checkbox"/> Check here if this is a Joint or Survivor Annuity		Death benefit exclusion	0	Age of recipient at start date	68	Number of months paid in 2018	12	Amounts previously recovered	1824
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See table below for other years

Tax Exclusion Table for CARL EVANS:

Tax Year	Recovered Prior years	Exclusion this year	Remaining cost
2014	0	456	7529
2015	456	456	7073
2016	912	456	6617
2017	1368	456	6161
2018	1824	456	5705
2019	2280	456	5249
2020	2736	456	4793
2021	3192	456	4337
2022	3648	456	3881
2023	4104	456	3425
2024	4560	456	2969
2025	5016	456	2513
2026	5472	456	2057
2027	5928	456	1601
2028	6384	456	1145
2029	6840	456	689
2030	7296	456	233
2031	7752	233	0