Schedule
X

Massachusetts
**Other Income**

2022

| First Name | MI | Last Name | Social Security No. |
|---|---|---|---|
| JOHN | Q | Q. | 587-65-4321 |

## Schedule X. Other Income

| | | | |
|---|---|---|---|
| 1 | Taxable alimony received. ► | 1 | 0 |

### Taxable IRA/Keogh Plan Distributions Smart Worksheet

| | | Taxpayer | Spouse |
|---|---|---|---|
| A | Total IRA/Keogh plan distributions, qualified charitable IRA distribution and Roth IRA conversion distributions received during 2022 from Federal return. | 11500 | 12000 |
| B | Non-MA portion of IRA/Keogh distributions. | | |
| C | Total contributions previously taxed by Massachusetts. | 23500 | 20000 |
| D | Total distributions received in previous years. | 0 | 0 |
| E | Subtract line D from line C. If line D is larger than line C enter '0'. | 23500 | 20000 |
| F | Subtract lines B and E from line A. Not less than "0" | 0 | 0 |
| G | Total qualified charitable IRA distributions in 2022, included in line A. | | |
| H | Taxable IRA/Keogh distributions or Roth IRA conversion distributions. Line F minus line G. Not less than "0". | 0 | 0 |

| | | | |
|---|---|---|---|
| 2 | Taxable IRA/Keogh and Roth IRA conversion distributions. ► | 2 | 0 |

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Federal Refund
$ 0

PERSONAL INFO | BUSINESS | PERSONAL | STATE TAXES | REVIEW | FILE

Massachusetts

## Taxable IRA/Keogh Distributions - John

Publci's federally taxable **IRA/Keogh plan distributions** received during 2022 are $11,500. To determine the taxable amount for Massachusetts, enter the following information.

Other Contributions Previously Taxed by Massachusetts: 23500

Total Distributions Received in Previous Years: 0

**Supporting Details**

Sort | Insert Line | Delete Line | Remove | Print | Help

Check this box to **NOT** print this supporting details ...... ►

Schedule X/Sch X, Smart Wks, C (TP)

| Description | Amount |
|---|---|
| SEP-IRA Hubbbie | 12,000.00 |
| IRA Hubbie | 5,000.00 |
| IRA Spouse | 6,500.00 |
| 3 Items Total | 23,500.00 |

Close

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Continue

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Federal Refund $ 0

MA Tax Due $ 1,765

PERSONAL INFO | BUSINESS | PERSONAL | STATE TAXES | REVIEW | FILE

Massachusetts

## Taxable IRA/Keogh Distributions - Spouse

Lucky One's federally taxable **IRA/Keogh plan distributions** received during 2022 are $12,000. To determine the taxable amount for Massachusetts, enter the following information.

| | |
|---|---|
| Other Contributions Previously Taxed by Massachusetts | 20000 |
| Total Distributions Received in Previous Years | 0 |

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Federal Refund $ 0

MA Tax Due $ 1,940

PERSONAL INFO | BUSINESS | PERSONAL | STATE TAXES | REVIEW | FILE

Massachusetts

## Taxable IRA/Keogh Distributions - Spouse

Lucky One's federally taxable **IRA/Keogh plan distributions** received during 2022 are $12,000. To determine the taxable amount for Massachusetts, enter the following information.

| | |
|---|---|
| Other Contributions Previously Taxed by Massachusetts | 20000 |
| Total Distributions Received in Previous Years | 0 |

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Federal Refund $ 0

MA Tax Due $ 1,940

PERSONAL INFO | BUSINESS | PERSONAL | STATE TAXES | REVIEW | FILE

Massachusetts

## Taxable IRA/Keogh Distributions - John

Publci's federally taxable **IRA/Keogh plan distributions** received during 2022 are $11,500. To determine the taxable amount for Massachusetts, enter the following information.

Other Contributions Previously Taxed by Massachusetts: 60000

Total Distributions Received in Previous Years: 52000

Form **1099-R** **Distributions from Pensions, IRAs, etc** **2022**

► Keep for your records

Name: **John Q Q.**

Social Security Number: **587-65-4321**

**Source Form:** 1099-R. . . . ► ☒ CSA-1099-R. . . ► ☐ CSF-1099-R. . . ► ☐ RRB-1099-R. . . ► ☐

**If Spouse's 1099-R,** check this box. . . ► ☐

Do not transfer this 1099-R to next year ☐

Corrected ☐

This section is for RRB-1099-R use only

**Payer's** name, street address, city, state, and ZIP code.

**Merrill Lynch - Chriss Cross**

**P O Box 1510 Mail Stop P08**

**Minneapolis MN 55440-1510**

Payer's foreign province

Payer's foreign postal code

Payer's country

Payer's Phone No.

**Payer's** Federal identification number: **41-1416330**

**Recipient's** identification number: **587-65-4321**

**Check to transfer Recipient's information from Federal Information Worksheet.** . . . . . . . . . . . . . . ☒

Recipient's name: **John Q Q.**

Street address (including apartment number): **77 Massachusetts Ave, Apt. 10-250**

City: **Cambridge** State: **MA** ZIP code: **02139**

Foreign Province

Foreign Postal Code

Foreign Country

10 Amount allocable to IRR within 5 years $

1 Gross distribution $ **5,000.00**

2 a Taxable amount (See Help) $

2 b Taxable amount not determined ► ☒ Total distribution ► ☐

3 Capital gain (included in box 2a) $

4 Federal income tax withheld $

5 Employee contributions /Designated Roth contributns or insurance premiums $

6 Net unrealized appreciation in employer securities $

7 Distribn code(s) 1st code **7** 2nd code **7** IRA/SEP/SIMPLE ☒

8 Other $ %

9 a Your percentage of total distribution %

9 b Total employee contributions $

11 1st year of desig. Roth contrib.

14 State tax withheld $ **0.00** $

15 Payer's State / state no. **MA** / /

16 State distribution $ **5,000.00** $

I confirm that the state withholding identification

Form **1099-R** **Distributions from Pensions, IRAs, etc** **2022**

► Keep for your records

Name: John Q Q.

Social Security Number: 587-65-4321

**Source Form:** 1099-R . . . ► [X] CSA-1099-R . . . ► [ ] CSF-1099-R . . . ► [ ] RRB-1099-R . . . ► [ ]

**If Spouse's 1099-R,** check this box . . . ► [ ]

Do not transfer this 1099-R to next year [ ]

Corrected [ ]

This section is for RRB-1099-R use only

**Payer's** name, street address, city, state, and ZIP code.

Fidelity Investments - SPOUSE
82 Devonshire St
5th Floor
Boston MA 02110

Payer's foreign province

Payer's foreign postal code

Payer's country

Payer's Phone No.

**Payer's** Federal identification number: 46-1234567

**Recipient's** identification number: 587-65-4321

**Check to transfer Recipient's information from Federal Information Worksheet** . . . . . . . . . . . . . . [X]

Recipient's name: John Q Q.

Street address (including apartment number): 77 Massachusetts Ave, Apt. 10-250

City: Cambridge State: MA ZIP code: 02139

Foreign Province

Foreign Postal Code

Foreign Country

10 Amount allocable to IRR within 5 years $

1 Gross distribution $ 6,500.00

2 a Taxable amount (See Help) $

2 b Taxable amount not determined ► [X] Total distribution ► [ ]

3 Capital gain (included in box 2a) $

4 Federal income tax withheld $

5 Employee contributions /Designated Roth contributns or insurance premiums $

6 Net unrealized appreciation in employer securities $

7 Distribn code(s) 1st code 7 2nd code 7 IRA/SEP/SIMPLE [X]

8 Other $ %

9 a Your percentage of total distribution %

9 b Total employee contributions $

11 1st year of desig. Roth contrib.

14 State tax withheld $ 0.00 $

15 Payer's State / state no. MA / /

16 State distribution $ 6,500.00 $

I confirm that the state withholding identification

# Massachusetts Reporting IRA & SEP-IREA Distributions

Form **1099-R** | **Distributions from Pensions, IRAs, etc** | **2022**

► Keep for your records

| Name | Social Security Number |
|---|---|
| Spouse Wealthy | 876-54-3219 |

**Source Form:** 1099-R . . . ► [X] CSA-1099-R . . . ► [ ] CSF-1099-R . . . ► [ ] RRB-1099-R . . . ► [ ]

**If Spouse's 1099-R,** check this box . . . ► [X]  Corrected [ ]

Do not transfer this 1099-R to next year [ ]

This section is for RRB-1099-R use only

**Payer's** name, street address, city, state, and ZIP code.

**T Rowe Price Hubbie SEP-IRA**
**Somewhereanywhere**
**Somewhere**
**Boston MA 02110**

Payer's foreign province | Payer's foreign postal code

Payer's country | Payer's Phone No.

**Payer's** Federal identification number: **46-1234556**

**Recipient's** identification number: **876-54-3219**

**Check to transfer Recipient's information from Federal Information Worksheet** . . . . . . . . . . . . . . . . [X]

Recipient's name: **Spouse Wealthy**

Street address (including apartment number): **77 Massachusetts Ave, Apt. 10-250**

City: **Cambridge** State: **MA** ZIP code: **02139**

Foreign Province | Foreign Postal Code

Foreign Country

| | | |
|---|---|---|
| 1 | Gross distribution | $ 12,000.00 |
| 2 a | Taxable amount (See Help) | $ |
| 2 b | Taxable amount not determined ► [X] / Total distribution ► [ ] | |
| 3 | Capital gain (included in box 2a) | $ |
| 4 | Federal income tax withheld | $ |
| 5 | Employee contributions /Designated Roth contributns or insurance premiums | $ |
| 6 | Net unrealized appreciation in employer securities | $ |
| 7 | Distribn code(s): 1st code 7, 2nd code 7; IRA/SEP/SIMPLE [X] | |
| 8 | Other | $ % |
| 9 a | Your percentage of total distribution | % |
| 9 b | Total employee contributions | $ |
| 10 | Amount allocable to IRR within 5 years | $ |
| 11 | 1st year of desig. Roth contrib. | |
| 14 | State tax withheld | $ 0.00 |
| 15 | Payer's State / state no. | MA / |
| 16 | State distribution | $ 12,000.00 |

Schedule
X

Massachusetts
**Other Income**

2022

| First Name | MI | Last Name | Social Security No. |
|---|---|---|---|
| JOHN | Q | Q. | 587-65-4321 |

## Schedule X. Other Income

1 Taxable alimony received. . . . . ► 1 | 0

### Taxable IRA/Keogh Plan Distributions Smart Worksheet

| | | Taxpayer | Spouse |
|---|---|---|---|
| A | Total IRA/Keogh plan distributions, qualified charitable IRA distribution and Roth IRA conversion distributions received during 2022 from Federal return. . . . . | 11500 | 12000 |
| B | Non-MA portion of IRA/Keogh distributions. . . . . | | |
| C | Total contributions previously taxed by Massachusetts. . . . . | 23500 | 20000 |
| D | Total distributions received in previous years. . . . . | 0 | 0 |
| E | Subtract line D from line C. If line D is larger than line C enter '0'. . . . . | 23500 | 20000 |
| F | Subtract lines B and E from line A. Not less than "0" | 0 | 0 |
| G | Total qualified charitable IRA distributions in 2022, included in line A. . . . . | | |
| H | Taxable IRA/Keogh distributions or Roth IRA conversion distributions. Line F minus line G. Not less than "0". . . . . | 0 | 0 |

2 Taxable IRA/Keogh and Roth IRA conversion distributions. . . . . ► 2 | 0