



24502R099

The Maryland General Assembly enacted House Bill 1148 in the 2016 Session requiring the collection of information detailing the amount of retirement income reported by an individual and/or their spouse by source.

**Part 1**

Your First Name \_\_\_\_\_ MI \_\_\_\_\_ Your Last Name \_\_\_\_\_ Your Social Security Number \_\_\_\_\_

Spouse's First Name \_\_\_\_\_ MI \_\_\_\_\_ Spouse's Last Name \_\_\_\_\_ Spouse's Social Security Number \_\_\_\_\_

**Part 2**

Your Age \_\_\_\_\_ Spouse's Age \_\_\_\_\_

**Part 3**

Are you or your spouse totally and permanently disabled? (Check if **Yes**): ☐ You ☐ Spouse

**Part 4 Retirement and Pension Benefits: Determine your source of retirement income and input the required information in the appropriate areas below.**

**Source description:**

	<b>Amount included in Federal Adjusted Gross Income</b>	
	<b>You</b>	<b>Spouse</b>
1. Retirement income received as a pension, annuity or endowment from an "employee retirement system" qualified under Sections 401(a), 403 or 457(b) of the Internal Revenue Code. Disability retirement pension or annuity included on line 1z of federal form 1040. (Do not include a traditional, Roth, or SIMPLE individual retirement account or annuity (IRA), a rollover IRA, a simplified employee plan (SEP), a Keogh plan, an ineligible deferred compensation plan or foreign retirement income.) . . . . . 1a.	00	1b. 00
2. An IRA under Section 408 (excluding Section 408(k)) of the Internal Revenue Code. Examples include a SIMPLE IRA under Section 408(p) of the Internal Revenue Code and a traditional IRA . . . . . 2a.	00	2b. 00
3. An IRA consisting entirely of contributions rolled over from a <i>defined benefit plan</i> . . . . . 3a.	00	3b. 00
4. A simplified employee pension (SEP) under Section 408(k) of the Internal Revenue Code. . 4a.	00	4b. 00
5. A Roth IRA under Section 408A of the Internal Revenue Code. . . . . 5a.	00	5b. 00
6. An ineligible deferred compensation plan under Section 457(f) of the Internal Revenue Code . . . . . 6a.	00	6b. 00
7. Other retirement income (for example, a Keogh Plan, also known as an HR-10), including foreign retirement income. . . . . 7a.	00	7b. 00
8. <b>Total: Add the amounts in the above columns and enter here.</b> (This line should reflect the total amount of pension, disability pension, IRA and annuities included in income on lines 1z, 4b, and 5b of your federal Form 1040, and line 8t of your federal Schedule 1) . . . . 8.	00	00

**Part 5**

	<b>You</b>	<b>Spouse</b>
9. Total benefits you received from Social Security and/or Railroad Retirement, Tier I and Tier II (See Instructions for Part 5) . . . . . 9a.	00	9b. 00
10. Amount of military retirement (from code letter u on Form 502SU) and public safety retirement (from code letter v on Form 502SU) income subtracted on Maryland Form 502. 10a.	00	10b. 00

**Part 6 If you claimed a Pension Exclusion on line 10a of Maryland Form 502, complete Part 6 using information from Worksheet 13A of the Maryland Resident Income Tax Return Instructions.**

11. Pension Exclusion (from line 5 of Worksheet 13A) . . . . . 11a.	00	11b. 00
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**Part 7 If you claimed the Retired Forest/Park/Wildlife Ranger (from line 10b on Form 502), complete Part 7 using information from Worksheet 13E of the Maryland Resident Income Tax Return Instructions.**

12. Retired Forest/Park/Wildlife Ranger pension exclusion (from line 8 of Worksheet 13E) . . 12a.	00	12b. 00
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