

## IRA RECORD – DISTRIBUTIONS

Name: \_\_\_\_\_ Age 59-1/2 (M/D/Y): \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Age 70-1/2 (M/D/Y): \_\_\_\_\_

Year \_\_\_\_\_

Account Description	Date	Distribution Amount	Code	Taxable Amount	Nontaxable Amount (Form 8606)	Basis of IRA As of 1/1 (Form 8606)
1.						
2.						
3.						
4.						
<b>Total</b>						

Year \_\_\_\_\_

Account Description	Date	Distribution Amount	Code	Taxable Amount	Nontaxable Amount (Form 8606)	Basis of IRA As of 1/1 (Form 8606)
1.						
2.						
3.						
4.						
<b>Total</b>						

Year \_\_\_\_\_

Account Description	Date	Distribution Amount	Code	Taxable Amount	Nontaxable Amount (Form 8606)	Basis of IRA As of 1/1 (Form 8606)
1.						
2.						
3.						
4.						
<b>Total</b>						

A permanent record should be kept for each individual (each spouse if filing jointly). Also keep copies of the tax return and Forms W-2, 8606, and 5498.

<u>Code</u>	<u>Type of Distribution</u>
EC	Withdrawal of Excess Contribution
PD	Premature Distribution
RD	Required Distribution
RO	Rollover
RT	Retirement

Year \_\_\_\_\_

<b>Account Description</b>	<b>Date</b>	<b>Distribution Amount</b>	<b>Code</b>	<b>Taxable Amount</b>	<b>Nontaxable Amount (Form 8606)</b>	<b>Basis of IRA As of 1/1 (Form 8606)</b>
1.						
2.						
3.						
4.						
<b>Total</b>						

Year \_\_\_\_\_

<b>Account Description</b>	<b>Date</b>	<b>Distribution Amount</b>	<b>Code</b>	<b>Taxable Amount</b>	<b>Nontaxable Amount (Form 8606)</b>	<b>Basis of IRA As of 1/1 (Form 8606)</b>
1.						
2.						
3.						
4.						
<b>Total</b>						

Year \_\_\_\_\_

<b>Account Description</b>	<b>Date</b>	<b>Distribution Amount</b>	<b>Code</b>	<b>Taxable Amount</b>	<b>Nontaxable Amount (Form 8606)</b>	<b>Basis of IRA As of 1/1 (Form 8606)</b>
1.						
2.						
3.						
4.						
<b>Total</b>						

Year \_\_\_\_\_

<b>Account Description</b>	<b>Date</b>	<b>Distribution Amount</b>	<b>Code</b>	<b>Taxable Amount</b>	<b>Nontaxable Amount (Form 8606)</b>	<b>Basis of IRA As of 1/1 (Form 8606)</b>
1.						
2.						
3.						
4.						
<b>Total</b>						

Year \_\_\_\_\_

<b>Account Description</b>	<b>Date</b>	<b>Distribution Amount</b>	<b>Code</b>	<b>Taxable Amount</b>	<b>Nontaxable Amount (Form 8606)</b>	<b>Basis of IRA As of 1/1 (Form 8606)</b>
1.						
2.						
3.						
4.						
<b>Total</b>						