



16502R099

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 Social Security Number Spouse's Social Security Number

Your First Name Initial

Your Last Name

Spouse's First Name Initial

Spouse's Last Name

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:	Amount included in Federal Adjusted Gross Income	
	You	Spouse
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. (Do not include a traditional, Roth or SIMPLE individual retirement account or annuity (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. Total: Add the amounts in the above columns and enter here. (This line should reflect the total amount of pension, IRA and annuities reported as income on lines 15b and 16b of your federal Form 1040 or lines 11b and 12b of your federal Form 1040A) 8.	.00	

Part 5

	You	Spouse
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 income subtracted on Maryland Form 502 (from code letter u on Form 502SU) 10a.	.00	10b. .00

Part 6

	You	Spouse
11. Pension Exclusion (from line 5 of Worksheet 13A) 11a.	.00	11b. .00