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Irs form 8606 roth ira

Form **8606** — Department of the Treasury, Internal Revenue Service (99)

Nondeductible IRAs

▶ See separate instructions.

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

OMB No. 1545-1007

2000

Attachment Sequence No. **48**

Your social security number | Name. If married,

Fill in Your Address Only if You Are Filing This Form by Itself and Not With Your Tax Return ▶ Apt. no. | Home address (numb | City, town or post office, state, and ZIP code

Part I **Traditional and SIMPLE IRAs**

Complete Part I if:

- You made nondeductible contributions to a traditional IRA for 2000,
- You received distributions from a traditional or SIMPLE IRA in 2000 **and** you made nondeductible contributions to a traditional IRA in 2000 or an earlier year, **or**
- You converted part, but not all, of your traditional or SIMPLE IRAs to Roth IRAs in 2000 **and** you made nondeductible contributions to a traditional IRA in 2000 or an earlier year. See the instructions for lines 8, 11, and 15 for special computations.

1 Enter your nondeductible contributions to traditional IRAs for 2000, including those made for 2000 from January 1, 2001, through April 16, 2001. See page 3 of the instructions . . . | 1

2 Enter your total basis in traditional IRAs for 1999 and earlier years. See page 3 of the instructions . | 2

3 Add lines 1 and 2 . . . | 3

Did you receive any distributions from traditional or SIMPLE IRAs or make a Roth IRA conversion in 2000?
- **No** ▶ Enter the amount from line 3 on line 12. Do not complete the rest of Part I.
- **Yes** ▶ Go to line 4.

4 Enter only those contributions included on line 1 that were made from January 1, 2001, through April 16, 2001. See page 3 of the instructions . . . | 4

5 Subtract line 4 from line 3 . . . | 5

6 Enter the value of **all** your traditional and SIMPLE IRAs as of December 31, 2000, plus any outstanding rollovers. See page 4 of the instructions | 6

7 Enter your total distributions from traditional and SIMPLE IRAs in 2000. **Do not** include rollovers or Roth IRA conversions. See page 4 of the instructions | 7

8 Add lines 6 and 7. (But if you converted any amount from traditional or SIMPLE IRAs to Roth IRAs in 2000, see page 4 of the instructions for the amount to enter.) . . | 8

9 Divide line 5 by line 8 and enter the result as a decimal (rounded to at least 3 places). **Do not** enter more than "1.000" . . . | 9 ×

10 Multiply line 7 by line 9. This is the amount of your nontaxable distributions for 2000 . . . | 10

11 Subtract line 10 from line 5. (But if you converted any amount from traditional or SIMPLE IRAs to Roth IRAs in 2000, see page 4 of the instructions for the amount to enter.) This is your basis in traditional IRAs as of December 31, 2000 . . . | 11

12 Add lines 4 and 11. This is your **total basis in traditional IRAs for 2000 and earlier years** . . . | 12

13 **Taxable distributions from traditional and SIMPLE IRAs.** Subtract line 10 from line 7. Also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b . . . | 13

Part II **2000 Conversions From Traditional or SIMPLE IRAs to Roth IRAs**

Caution: *If your modified adjusted gross income is over $100,000* ***or*** *you are married filing separately and you lived with your spouse at any time in 2000, you* ***cannot*** *convert any amount from traditional or SIMPLE IRAs to Roth IRAs for 2000. If you erroneously made a conversion, you must recharacterize (correct) the conversion. See page 4 of the instructions for details.*

14a Enter the total amount you converted from traditional and SIMPLE IRAs to Roth IRAs in 2000 . . . | 14a

b Enter the portion of the amount on line 14a that you **recharacterized** back to a traditional or SIMPLE IRA. **Do not** include earnings or reduce the amount recharacterized by any loss that occurred in the Roth IRA. See page 5 of the instructions . . . | 14b

c Subtract line 14b from line 14a. This is the net amount you converted to Roth IRAs in 2000 . . . | 14c

15 Enter your basis in the amount on line 14c from traditional IRAs. See page 6 of the instructions . . | 15

16 **Taxable amount of conversions.** Subtract line 15 from line 14c. Also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b . . . | 16

For Paperwork Reduction Act Notice, see page 8. Cat. № 63966F Form **8606** (2000)

1	Enter your nondeductible contributions to traditional IRAs for 2015, including those made for 2015 from January 1, 2016, through April 18, 2016 (see instructions)	1	5500
2	Enter your total basis in traditional IRAs (see instructions)	2	
3	Add lines 1 and 2	3	5500
	In 2015, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? — **No** ▶ Enter the amount from line 3 on line 14. Do not complete the rest of Part I. — **Yes** ▶ Go to line 4.		
4	Enter those contributions included on line 1 that were made from January 1, 2016, through April 18, 2016	4	
5	Subtract line 4 from line 3	5	5500
6	Enter the value of **all** your traditional, SEP, and SIMPLE IRAs as of December 31, 2015, plus any outstanding rollovers (see instructions) — 6: 0		
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2015. **Do not** include rollovers, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions) — 7: 0		
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2015. **Do not** include amounts converted that you later recharacterized (see instructions). Also enter this amount on line 16 — 8: 5146 09		
9	Add lines 6, 7, and 8 — 9: 5146 09		
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000" — 10: × 1 . 000		
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also enter this amount on line 17 — 11: 5146 09		
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA — 12: 0		
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	5146 09
14	Subtract line 13 from line 3. This is **your total basis in traditional IRAs for 2015 and earlier years**	14	353 91
15	**Taxable amount.** Subtract line 12 from line 7. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b. **Note.** You may be subject to an additional 10% tax on the amount on line 15 if you were under age 59½ at the time of the distribution (see instructions).	15	0

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☐ CORRECTED (if checked)

TRUSTEE'S or ISSUER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code	1 IRA contributions (other than amounts in boxes 2–4, 8–10, 13a, and 14a) $	OMB No. 1545-0747 **2021** Form **5498**	**IRA Contribution Information**
	2 Rollover contributions $		
	3 Roth IRA conversion amount $	4 Recharacterized contributions $	**Copy B**
TRUSTEE'S or ISSUER'S TIN / PARTICIPANT'S TIN	5 FMV of account $	6 Life insurance cost included in box 1 $	**For Participant**
PARTICIPANT'S name	7 IRA ☐ SEP ☐ SIMPLE ☐ Roth IRA ☐		This information is being furnished to the IRS.
	8 SEP contributions $	9 SIMPLE contributions $	
Street address (including apt. no.)	10 Roth IRA contributions $	11 If checked, required minimum distribution for 2022 ☐	
	12a RMD date	12b RMD amount $	
City or town, state or province, country, and ZIP or foreign postal code	13a Postponed/late contrib. $	13b Year / 13c Code	
	14a Repayments $	14b Code	
Account number (see instructions)	15a FMV of certain specified assets $	15b Code(s)	

Form **5498** (keep for your records) www.irs.gov/Form5498 Department of the Treasury - Internal Revenue Service

Part II **2018 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs**

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2018.

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2018.	16	6,000
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	6,000
18	**Taxable amount.** Subtract line 17 from line 16. If more than zero, also include this amount on 2018 Form 1040, line 4b; or 2018 Form 1040NR, line 17b	18	0

Example 1

Form **8606** — Department of the Treasury, Internal Revenue Service (99)

Nondeductible IRAs

▶ See separate instructions.

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

OMB No. 1545-0074 — **2007** — Attachment Sequence No. **48**

Name. If married, file a separate form for each spouse required to file Form 8606. See page 5 of the instructions.: Margaret Maple

Your social security number: 789 : 00 : 1234

Fill in Your Address Only If You Are Filing This Form by Itself and Not With Your Tax Return

Home address (number and street, or P.O. box if mail is not delivered to your home): 239 S. Main Street

Apt. no.:

City, town or post office, state, and ZIP code: Greensburg, KS 67054

Part I **Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs**

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2007.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2007 **and** you made nondeductible contributions to a traditional IRA in 2007 or an earlier year. For this purpose, a distribution does not include a rollover, qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2007 (excluding any portion you recharacterized) **and** you made nondeductible contributions to a traditional IRA in 2007 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2007, including those made for 2007 from January 1, 2008, through April 15, 2008 (see page 5 of the instructions)	1	0 00
2	Enter your total basis in traditional IRAs (see page 5 of the instructions)	2	10,000 00
3	Add lines 1 and 2	3	10,000 00

In 2007, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion?
- **No** ▶ Enter the amount from line 3 on line 14. Do not complete the rest of Part I.
- **Yes** ▶ Go to line 4.

4	Enter those contributions included on line 1 that were made from January 1, 2008, through April 15, 2008	4	0 00
5	Subtract line 4 from line 3	5	10,000 00
6	Enter the value of **all** your traditional, SEP, and SIMPLE IRAs as of December 31, 2007, plus any outstanding rollovers (see page 6 of the instructions)	6	50,000 00
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2007. **Do not** include rollovers, qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see page 6 of the instructions)	7	30,000 00
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2007. **Do not** include amounts converted that you later recharacterized (see page 6 of the instructions). Also enter this amount on line 16	8	0 00
9	Add lines 6, 7, and 8	9	80,000 00
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	× . 125
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also enter this amount on line 17	11	0 00
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	3,750 00
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	3,750 00
14	Subtract line 13 from line 3. This is **your total basis in traditional IRAs for 2007 and earlier years**	14	6,250 00
15	**Taxable amount.** Subtract line 12 from line 7. Also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b. **Note:** *You may be subject to an additional 10% tax on the amount on line 15 if you were under age 59½ at the time of the distribution (see page 6 of the instructions).*	15	26,250 00

For Privacy Act and Paperwork Reduction Act Notice, see page 8 of the instructions. Cat. No. 63966F Form **8606** (2007)

Qualified recovery assistance distributions 13,125
Other distributions 13,125

Is there a tax form for roth ira. Do i get a tax form for contributing to a roth ira. Do i need to file form 8606 for roth ira. Do you receive a 1099 r for a roth ira. How to fill out form 8606 for roth distribution.

However, the government's agency expressed that the form of the IRS 1040 may be different from its published draft. The IRS 1040 is the form used by US taxpayers to submit their annual income return. Married couples, for example, need to have a modified adjusted raw income less than $ 208,000 to make any contributions to a Roth's wrath. Base includes the total number of contributions that you do. Attach this form to your form 1040. According to them, these changes will simplify and simplify your tax declaration presentation. The new IRS 1040 form will change your order to simplify. Read to prepare before the tax fiscal is drag into you. The account becomes deductible for your state and federal fiscal returns as long as you contribute the same year. This penalty occurs when you take money from your wrath before reaching the age of 59 1/2. If you make contributions not to a traditional anger, fill in the formulary 8606 and file it with your return. The new fiscal tax forms of IRS 1040 released by the IRS reflects these changes. Here are some of the most noted deductions and exemptions â €

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