

IRA RECORD – CONTRIBUTIONS

Name: _____ Social Security Number: _____

Birthdate: _____ Age 70-1/2 (M/D/Y): _____

Year _____

Account Description	Date	Amount	Rollover	FMV 12/31 (Form 5498)	Deductible Contributions	Nondeductible Contributions
1.						
2.						
3.						
4.						
5.						
Total						

Year _____

Account Description	Date	Amount	Rollover	FMV 12/31 (Form 5498)	Deductible Contributions	Nondeductible Contributions
1.						
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Total						

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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.

Year _____

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