

Appendix A. Summary Record of Traditional IRA(s) for 2018

Keep for Your Records 

Name _____

I was covered not covered by my employer's retirement plan during the year.

I became 59½ on _____ (month) (day) (year)

I became 70½ on _____ (month) (day) (year)

Contributions

Name of traditional IRA	Date	Amount contributed for 2018	Check if rollover contribution	Fair Market Value of IRA as of December 31, 2018, from Form 5498
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
Total				

Total contributions deducted on tax return \$ _____
 Total contributions treated as nondeductible on Form 8606 \$ _____

Distributions

Name of traditional IRA	Date	Amount of Distribution	Reason (for example, retirement, rollover, conversion, withdrawal of excess contributions)	Income earned on IRA	Taxable amount reported on income tax return	Nontaxable amount from Form 8606, line 13
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
Total						

Basis of all traditional IRAs for 2018 and earlier years (from Form 8606, line 14) \$ _____

Note. You should keep copies of your income tax return, and Forms W-2, 8606, and 5498.