

Goodwill NCW Valet VITA

Supplemental Questions: Retirement Contributions

If you contributed to a retirement plan in 2022 (ex: 401(K), 403(B), IRA), and we determine that you may be eligible for the Retirement Savers Credit, we will need to know if you have taken any money out of a retirement plan since 2019. So that we will have this information, please answer the questions below.

1. Did you take any money out of a 401(K), IRA or pension account in 2023, 2022, 2021, 2020 or 2019?

_____ Yes

_____ No

2. If yes, provide the amount and type of distribution(s):

2023: \$_____ Total amount of distribution(s) – enter zero if none.

2023: Type of distribution(s): _____ (Ex: 401K, military, IRA, etc.)

2022: \$_____ Total amount of distribution(s) – enter zero if none.

2022: Type of distribution(s): _____ (Ex: 401K, military, IRA, etc.)

2021: \$_____ Amount of distribution(s) – enter zero if none.

2021: Type of distribution(s): _____ (Ex: 401K, military, IRA, etc.)

2020: \$_____ Amount of any distribution(s) – enter zero if none.

2020: Type of distribution(s): _____ (Ex: 401K, military, IRA, etc.)

2019: \$_____ Amount of any distribution(s) – enter zero if none.

2019: Type of distribution(s): _____ (Ex: 401K, military, IRA, etc.)