

Client Code _____

Taxpayer Name _____

Form -0701

Sheet _____

Miscellaneous Income

TSJ _____

FS _____

State _____

City _____

Taxable pensions and annuities _____ +

Nontaxable portion of pensions and annuities _____ +

Insurance premiums for retired public safety officers _____ +

Federal withholding (Form 1099-R) _____ +

State withholding (Form 1099-R) _____ +

Total unemployment compensation received _____ +

Unemployment compensation repaid in 2015 _____ +

Social security received _____ +

Social security repaid _____ +

Medicare premiums withheld _____ +

Section 931 and 933 exclusions _____ +

Tier 1 railroad retirement received _____ +

Tier 1 railroad retirement repaid _____ +

Taxable IRA distributions _____ +

Nontaxable IRA distributions _____ +

Qualified charitable distribution _____ +

Qualified HSA funding distribution _____ +

Total lump sum social security received _____ +

Lump sum taxable social security _____ +

Gambling winnings (not reported on W-2G) _____ +

Jury duty pay _____ +

Other federal withholding _____ +

Other state withholding _____ +

Other federal and state withholding code (see help) _____

State use 1 _____

State use 2 _____

X for Dual Status Statement _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

Reserved _____

IRS-1099MISC Box 128 = X if no 1099-MISC received
IRS-W2G Box 132 = X if no W-2G received

(X if IRA)

(X in box 132)

(Enter a description in Box 40 or 115)

IRS-1099R Box 61
IRS-1099G Box 64
IRS-SSA1099 Box 47
IRS-1099MISC Box 68
IRS-W2G Box 52

IRS-1099R Box 72
IRS-1099G Box 72
IRS-1099MISC Box 81
IRS-W2G Box 73

IRS-1099R Box 170
IRS-1099G Box 102
IRS-SSA1099 Box 118
IRS-1099MISC Box 100
IRS-W2G Box 131

Other Income, Adjustments and
Student Loan Interest

**IRS-1099MISC

1-SE income 3-Other adj. SE 5-Other adjustment non SE 7-Jury duty pay given to employer Blank-Portfolio
2-Non SE inc. 4-Subpay repaid 6-Student loan interest paid 8-Whistle blower fees (Default)

Nature and Source	+ Amount	Code	% for EI	TSJ	FS	State	City	Dual Status	State Use	Prior Year
110 Box 40 or 115	111 Box 67	112 116	113 •117	114 30	115 31	116 32	117 Box 33	118 100	119 118	
120	121	122	123 •	124 T	125	126	127	128	129	
130	131	132	133 •	134 T	135	136	137	138	139	
140	141	142	143 •	144 T	145	146	147	148	149	

IRS-1099MISC Box 128 = X if no 1099-MISC received

Hash Total: 00 _____