

Income Sources

- | | | | |
|---|----------|--|----------|
| a. All Social Security payments
(must be full amount received
and not the taxable amount) | \$ _____ | h. Interest (including nontaxable
interest) | \$ _____ |
| b. Dividends | \$ _____ | i. Income from trusts | \$ _____ |
| c. Capital gains | \$ _____ | j. Net earnings from farming,
business or profession | \$ _____ |
| d. Gains from sales or exchanges | \$ _____ | k. Net rental income | \$ _____ |
| e. Payments from governmental or
private retirement or pension plans | \$ _____ | l. Alimony or support money | \$ _____ |
| f. IRA and Annuity Earnings | \$ _____ | m. Unemployment insurance
payments, disability payments,
workers' compensation, etc. | \$ _____ |
| g. Salaries and wages
(including bonuses) | \$ _____ | | |

***Allowable Deductions:**

- Unreimbursed medical and prescription drug expenses.
This does not include unpaid expense bills.
- If you filed the 1040 Federal Tax Return and completed a schedule A, we can use the information on the schedule for paid unreimbursed medical or prescription expenses. You do not have to send in the receipts.

Total Income Sources + \$ _____
(add lines a-m)

*Unreimbursed medical and
prescription drug expenses - \$ _____

Total Combined Income = \$ _____

Total Combined Income does not include:

- | | |
|--|--|
| - IRA distributions | - Supplemental Security Income (SSI) |
| - Cash Assistance (Public Assistance) | - Gifts, inheritances |
| - Reverse mortgage proceeds (but any interest
or dividends realized from the investment of such
proceeds are income) | - Return of capital |
| | - Nazi persecution reparation payments |
| | - Federal Foster Grandparent Program payment |