### Part I.—DIVIDEND INCOME

1. **Name of qualifying corporation declaring dividend:**
   
   (Indicate by (Y), (N), or (J) whether stock is held by husband, wife, or jointly)

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
</table>

2. **Total**

3. **Exclusion of $50 (If both husband and wife received dividends, each is entitled to exclude not more than $50 of his (her) own dividends)**

4. **Subtract line 3 from line 2. Enter here and on line 1, Part VII.**

5. **Name of nonqualifying corporation declaring dividend:**

6. **Total (add lines 4 and 5). Enter here and on line 5a, page 1, Form 1040.**

### Part II.—INTEREST INCOME

(This includes interest credited to your account)

**Note:** A separate attachment may be used if interest is the only income to be reported on this schedule.

1. **Name of payer (more than one entry may be made on a line).**

2. **Total—Enter here and on line 5b, page 1, Form 1040.**

### Part III.—PENSION AND ANNUITY INCOME

**A—General Rule** (If you did not contribute to the cost of the pension or annuity, enter the total amount received on line 6 and omit lines 1 through 5.)

1. **Investment in contract**

2. **Expected return**

3. **Percentage of income to be excluded**
   (line 1 divided by line 2)

4. **Amount received this year**

5. **Amount excludable (line 4 multiplied by line 3)**

6. **Taxable portion (excess of line 4 over line 5)**

**B—Special Rule**—Where your employer has contributed part of the cost and your own contribution will be recovered tax-free within 3 years. If your cost was fully recovered in prior years, enter the total amount received in line 5 and omit lines 1 through 4.

1. **Cost of annuity (amounts you paid)**

2. **Cost received tax-free in past years**

3. **Remainder of cost (line 1 less line 2)**

4. **Amount received this year**

5. **Taxable portion (excess, if any, of line 4 over line 3)**

### Part IV.—RENT AND ROYALTY INCOME

1. **Kind and location of property**
   (Identify whether rent or royalty)

2. **Total amount of rents or royalties**

3. **Depreciation (explain in Part VI) or depletion**

4. **Repairs (attach itemized list)**

5. **Other expenses (attach itemized list)**

1. **Totals**

2. **Net income (or loss) from rents and royalties (column 2 less sum of columns 3, 4, and 5)**

### Part V.—OTHER INCOME OR LOSSES

1. **Partnerships (name, address, and nature of income)**

2. **Estates or trusts (name and address)**

3. **Other sources (state nature)**

**TOTAL INCOME (or loss) from Parts III, IV, and V** (Enter here and on line 5c, page 1, of Form 1040)
### Part VI.—EXPLANATION OF DEPRECIATION CLAIMED IN PART IV

<table>
<thead>
<tr>
<th>1. Group and guideline class (Description of property)</th>
<th>2. Cost or other basis at beginning of year</th>
<th>3. Asset additions in year (amount)</th>
<th>4. Asset retirements in year (amount) (applicable only to Rev. Proc. 82-21)</th>
<th>5. Depreciation allowed or allowable in prior years</th>
<th>6. Method of computing depreciation</th>
<th>7. Class or life</th>
<th>8. Depreciation for this year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cost or other basis:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Total depreciation: .................................................................

2. Amount of additional first-year depreciation included above: ........................................

3. Cost or other basis of fully depreciated assets still in use: ...........................................

### Part VII.—DIVIDENDS RECEIVED CREDIT

1. Amount of dividends on line 4, Part I: .................................................................

2. Tentative credit (4% of line 1): .................................................................

3. Tax shown on line 12, page 1 of Form 1040, less amount, if any, of credit for foreign taxes: .................................................................

4. 4% of taxable income (see below): .................................................................

   - Taxable Income
   - (a) If tax is computed, the amount shown on line 11d, page 1 of Form 1040.
   - (b) If Tax Table is used, the amount shown on line 9, page 1 of Form 1040, less 10% thereof, and less the deduction for exemptions ($600 multiplied by the number of exemptions claimed on line 3, Schedule A, page 2 of Form 1040).

5. Credit. Enter here and on line 15(c), Form 1040, the smallest of the amounts on line 2, 3, or 4, above: .................................................................

### Part VIII.—RETIREMENT INCOME CREDIT

If separate return, use column B only. If joint return, use column A for wife and column B for husband: .................................................................

Did you receive earned income in excess of $600 in each of any 10 calendar years before the taxable year 1962? (Widows or widowers see instructions, page B-4): .................................................................

If answer above is "Yes" in either column, furnish all information below in that column.

1. Retirement income for taxable year:
   - (a) For taxpayers under 65 years of age:
     Enter only income received from pensions and annuities under public retirement systems (e.g., Fed., State Govts., etc.) and included in line 9, page 1, of Form 1040: .................................................................
   - (b) For taxpayers 65 years of age or older:
     Enter total of pensions and annuities, interest, and dividends included in line 9, page 1 of Form 1040, and gross rents included in column 2, Part IV of this schedule: .................................................................

2. Maximum amount of retirement income for credit computation: .................................................................

3. Deduct:
   - (a) Amounts received in taxable year as pensions or annuities under the Social Security Act, the Railroad Retirement Acts, and certain other exclusions from gross income: .................................................................
   - (b) Earned income received in taxable year (Does not apply to persons 72 years of age or over):
     - (1) Taxpayers under 62 years of age, enter amount in excess of $900: .................................................................
     - (2) Taxpayers 62 or over but under 72, enter amount determined as follows:
       - if $1,200 or less, enter zero: .................................................................
       - if over $1,200 but not over $1,700, enter 1/2 of amount over $1,200: .................................................................
       - if over $1,700, enter excess over $1,450: .................................................................

4. Total of lines 3(a) and 3(b): .................................................................

5. Balance (line 2 minus line 4): .................................................................

6. Line 5 or line 1, whichever is smaller: .................................................................

7. Tentative credit (20% of line 6): .................................................................

8. Total tentative credit (total of amounts on line 7, columns A and B): .................................................................

**LIMITATION ON RETIREMENT INCOME CREDIT**

9. Amount of tax shown on line 12, page 1 of Form 1040: .................................................................

10. Less: Total of any amounts shown on lines 15(c) and 15(f), page 1, Form 1040: .................................................................

11. Subtract line 10 from line 9: .................................................................

12. Credit. Enter here and on line 15(d), Form 1040, the amount on line 8 or line 11, whichever is smaller: .................................................................