

**SCHEDULE B
(Form 1040)**

U.S. Treasury Department
Internal Revenue Service

SUPPLEMENTAL SCHEDULE OF INCOME AND CREDITS

(From all sources other than wages, business, farming, and sale or exchange of property)

Attach this schedule to your income tax return, Form 1040

1963

Name and address as shown on page 1 of Form 1040

Part I.—DIVIDEND INCOME (Income from savings (building) and loan associations and credit unions should be entered as interest in Part II)

	AMOUNT
1. Name of qualifying corporation declaring dividend (more than one entry may be made on a line) (Indicate by (H), (W), (J) whether stock is held by husband, wife, or jointly)	
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: Controlled foreign corporations (attach Form 3646)	
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.

	AMOUNT
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.)

	AMOUNT
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 on line 5 and omit lines 1 through 4.

1. Cost of annuity (amounts you paid)		4. Amount received this year	
2. Cost received tax-free in past years		5. Taxable portion (excess, if any, of line 4 over line 3)	
3. Remainder of cost (line 1 less line 2)			

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 of Parts III, IV, and V (Enter here and on line 5c, page 1, of Form 1040)

Part VI.—EXPLANATION OF DEDUCTION FOR DEPRECIATION CLAIMED IN PART IV—This schedule is designed for taxpayers using the alternative guidelines and administrative procedures described in Revenue Procedure 62-21 as well as for those taxpayers who wish to continue using procedures authorized prior to the revenue procedure. Where double headings appear use the first heading for the new procedure and the second heading for the older procedure.

Table with 8 columns: 1. Group and guideline class OR Description of property; 2. Cost or other basis at beginning of year OR Cost or other basis; 3. Asset additions in year (amount) OR Date acquired; 4. Asset retirements in year (amount) (applicable only to Rev. Proc. 62-21); 5. Depreciation allowed or allowable in prior years; 6. Method of computing depreciation; 7. Class life OR Rate (%) or life; 8. Depreciation for this year. Includes rows for Total cost or other basis, Total depreciation, and Amount of additional first-year depreciation.

Part VII.—DIVIDENDS RECEIVED CREDIT

Table with 2 columns: Description and Amount. Rows include: 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); 5. Credit. Enter here and on line 13(a), Form 1040, the smallest of the amounts on line 2, 3, or 4, above.

Part VIII.—RETIREMENT INCOME CREDIT

This credit does not apply { 1. If you received pensions or annuities of \$1,524 or more from Social Security or Railroad Retirement; 2. If you are under 62 years of age and had "earned income" of \$2,424 or more; OR 3. If you are 62 or over and under 72, and had "earned income" of \$2,974 or more.

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 1963? (Widows or widowers see instructions, page B-4)

Table with 2 columns: A and B. Each column has Yes/No checkboxes. Row 1: Retirement income for taxable year: (a) For taxpayers under 65 years of age; (b) For taxpayers 65 years of age or older.

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); 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).

Table with 2 columns: A and B. Each column has a sub-column for 1,524 00. Rows correspond to lines 2, 3(a), 3(b), 4, 5, 6, 7, and 8 of the text.

LIMITATION ON RETIREMENT INCOME CREDIT

Table with 2 columns: Description and Amount. Rows include: 9. Amount of tax shown on line 12, page 1 of Form 1040; 10. Less: Total of any amounts shown on lines 13(a) and 13(d), page 1, Form 1040; 11. Subtract line 10 from line 9; 12. Credit. Enter here and on line 13(b), Form 1040, the amount on line 8 or line 11, whichever is smaller.