

**SCHEDULE B
(Form 1040)**

U.S. Treasury Department
Internal Revenue Service

**SUPPLEMENTAL SCHEDULE OF INCOME
AND RETIREMENT INCOME CREDIT**

(From pensions and annuities, rents and royalties, partnerships, and estates or trusts)

1964

Attach this schedule to your income tax return, Form 1040

Name and address as shown on page 1 of Form 1040

Part I.—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		4. Amount received this year •	
2. Expected return		5. Amount excludable (line 4 multiplied by line 3)	
3. Percentage of income to be excluded (line 1 divided by line 2) %		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)			

