

NASH & COMPANY, PC
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RETIREMENT PLAN CONTRIBUTION/DISTRIBUTION WORKSHEET

CLIENT: _____

*Please indicate distributions (money withdrawn) with a minus sign or in parentheses.
 **Do NOT include 401k contributions, distributions, or rollovers to an IRA.

YEAR	DEDUCTIBLE IRA	NON-DED IRA	SEP	SIMPLE	KEOUGH
1976	_____	_____	_____	_____	_____
1977	_____	_____	_____	_____	_____
1978	_____	_____	_____	_____	_____
1979	_____	_____	_____	_____	_____
1980	_____	_____	_____	_____	_____
1981	_____	_____	_____	_____	_____
1982	_____	_____	_____	_____	_____
1983	_____	_____	_____	_____	_____
1984	_____	_____	_____	_____	_____
1985	_____	_____	_____	_____	_____
1986	_____	_____	_____	_____	_____
1987	_____	_____	_____	_____	_____
1988	_____	_____	_____	_____	_____
1989	_____	_____	_____	_____	_____
1990	_____	_____	_____	_____	_____
1991	_____	_____	_____	_____	_____
1992	_____	_____	_____	_____	_____
1993	_____	_____	_____	_____	_____
1994	_____	_____	_____	_____	_____
1995	_____	_____	_____	_____	_____
1996	_____	_____	_____	_____	_____
1997	_____	_____	_____	_____	_____
1998	_____	_____	_____	_____	_____
1999	_____	_____	_____	_____	_____
2000	_____	_____	_____	_____	_____
2001	_____	_____	_____	_____	_____
2002	_____	_____	_____	_____	_____
2003	_____	_____	_____	_____	_____
2004	_____	_____	_____	_____	_____
2005	_____	_____	_____	_____	_____
2006	_____	_____	_____	_____	_____
2007	_____	_____	_____	_____	_____
2008	_____	_____	_____	_____	_____
2009	_____	_____	_____	_____	_____
2010	_____	_____	_____	_____	_____
TOTAL	-	-	-	-	-

Traditional IRA Contribution Limits:

- 1976 - 1981 \$1,500 (+ \$250 with spousal contribution)
- 1982 - 1996 \$2,000 (+ \$250 with spousal contribution)
- 1997 - 2001 \$2,000
- 2002 - 2004 \$3,000 + \$500 catch-up
- 2005 \$4,000 + \$500 catch-up
- 2006 \$4,000 + \$1,000 catch-up