

# Roth Basis Computation

(Keep for your records)

**2018**

Name(s) as shown on return

Tax ID Number

## CONTRIBUTIONS

**Taxpayer**

**Spouse**

- |  |       |       |
|--|-------|-------|
| 1. Basis in your Roth contributions as of 12/31/2017 . . . . .   | _____ | _____ |
| 2. Roth IRA contributions for 2018 . . . . .   | _____ | _____ |
| 3. Basis in contributions before distributions, total of line 1 and line 2 . . . . .   | _____ | _____ |
| 4. Non-qualified Roth distributions from Form 8606, line 19 . . . . .  | _____ | _____ |
| 5. Qualified Roth distributions . . . . .  | _____ | _____ |
| 6. Total of line 4 and line 5 . . . . .  | _____ | _____ |
| 7. Subtract line 6 from line 3. Do not enter less than zero. This is your basis in Roth contributions as of 12/31/2018 . . . . . | _____ | _____ |

## ROLLOVERS AND CONVERSIONS

- |  |       |       |
|--|-------|-------|
| 8. Basis in rollovers and conversions as of 12/31/2017 . . . . .   | _____ | _____ |
| 9. Conversions to Roth during 2018 . . . . .   | _____ | _____ |
| 10. Basis in rollovers and conversions before distributions, total of lines 8 and 9 . . . . .            | _____ | _____ |
| 11. If line 6 is greater than line 3, enter difference. Otherwise, enter zero . . . . .                  | _____ | _____ |
| 12. Subtract line 11 from line 10. This is your basis in Roth conversions and rollovers as of 12/31/2018 | _____ | _____ |