

Roth Basis Computation

(Keep for your records)

2020

Name(s) as shown on return

Tax ID Number

CONTRIBUTIONS	Taxpayer	Spouse
1. Basis in your Roth contributions as of 12/31/2019	_____	_____
2. Roth IRA contributions for 2020	_____	_____
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 12/31/2020	_____	_____
ROLLOVERS AND CONVERSIONS		
8. Basis in rollovers and conversions as of 12/31/2019	_____	_____
9. Conversions to Roth during 2020	_____	_____
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 12/31/2020	_____	_____