

# Roth Basis Computation

(Keep for your records)

**2016**

Name(s) as shown on return

Tax ID Number

<b>CONTRIBUTIONS</b>	<b>Taxpayer</b>	<b>Spouse</b>
1. Basis in your Roth contributions as of 12/31/2015 . . . . .	_____	_____
2. Roth IRA contributions for 2016 net of any recharacterizations . . . . .	_____	_____
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 12/31/2016 . . . . .	_____	_____
<b>ROLLOVERS AND CONVERSIONS</b>		
8. Basis in rollovers and conversions as of 12/31/2015 . . . . .	_____	_____
9. Conversions to Roth during 2016 (net of any recharacterizations) . . . . .	_____	_____
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 12/31/2016	_____	_____