TAXABLE YEAR

Additional Taxes on Qualified Plans								
(Including IRAs) and Other								
Tax-Favored Accounts								



-									
First name			Initial Last name				SSN or ITIN		
Address (number and street, PO Box, or PMI				A	Apt. no. /Ste. no.		Check this box if this is an amended form		
City					Sta	ate	ZIP code		
Part I	retirement plan (including an IF	RA) d	ns – Complete this part if you received a taxable or modified endowment contract. You may also stribution or you received a Roth IRA distributio	have	to complete	this	part if you received a fede		
1 Ear	,		Roth IRA distributions, see instructions					00	
2 Ear	ly distributions included on line 1	that	are not subject to additional tax. See instruction	is. En	iter the appro	pria	te exception		
nur	nber from instructions 💽 📃							00	
3 Am	3 Amount subject to additional tax. Subtract line 2 from line 1*							00	
		'	nter the amount here and include this amount in						
			red to file a California income tax return, sign th						
								00	
-		dist	ribution from a SIMPLE IRA, you may have to ir	nclud	e 6% (.06) o	f tha	it amount on line 4 instead	of 21⁄2% (.025).	
See instructions.									
Part I	Additional Tax on Certain Dist Schedule CA (540 or 540NR) fr	ribut rom :	ions from Education Accounts and ABLE Account a coverdell education savings account (ESA), a	unts - quali	 Complete t ified tuition p 	nis p rogr	part if you included an amo am (QTP), or an ABLE acc	ount in income on count.	
5 Dis	tributions included in income from	n a C	overdell ESA, a QTP, or an ABLE account. See in	nstru	ctions			00	
6 Dis	tributions included on line 5 that a	re no	ot subject to additional tax. See instructions			í		00	
7 Am	ount subject to additional tax. Sub	tract	line 6 from line 5					00	
For	m 540NR, line 73. If you are not re	equir	ed to file a California income tax return, sign th	is for	m below and	refe	er to		
the	instructions							00	
Part III Additional Tax on Distributions from Archer and Medicare Advantage Medical Savings Accounts (MSAs) – Complete this part if you reported a taxable distribution from an MSA on federal Form 8853.									
9 Tax	able Archer MSA distribution from	n fed	eral Form 8853, line 8. See instructions					00	
10 a	If you meet any of the exceptions	to th	e 12.5% tax (see instructions), check here				🖲 10a 🗌 👘 👘		
			25). Enter the amount here and include this am						
	Form 540, line 63 or Form 540NR	, line	73. If you are not required to file a California in	icom	е				
	tax return, sign this form below ar	nd re	fer to the instructions	. 🔘	10b		00		
11 Ad	ditional tax due from Medicare Adv	vanta	ge MSA distributions. Enter the amount from fe	edera	l Form 8853,	line	13b. Also,		
inc	lude this amount in the total on Fo	orm 5	40, line 63 or Form 540NR, line 73. If you are n	not re	quired to file	a C	alifornia	1	
inc	ome tax return, sign this form belo	ow a	nd refer to the instructions. Form 540NR filers,	see i	nstructions .			00	
Signatu	re. Complete only if you are filing	this	form by itself and not with your tax return.						
			e examined this return, including accompanying lawful to forge a spouse's/registered domestic p				nents, and to the best of m	ly knowledge and	
Your sig	nature						Date		
X		Ť (
-	e of paid preparer (declaration of pre	pare	r is based on all information of which preparer has	any k	(nowledge.)		PTIN		
Fine-1-									
riin's N	ame (or yours if self-employed) and a	laure	>>				Firm's FEIN		

Γ