

CA Exclusions for Uniformed Service Retirement or Survivor Annuitant

- 1) Are you receiving retirement pay from the service in the Army, Marine Corps, Navy, Air Force, Space Force, Coast Guard, Army National Guard, Air National Guard, the commissioned corps of the United States Public Health Services, or the National Oceanic and Atmospheric Administration Commissioned Officer Corps (collectively, **uniformed services**)?

Tax Payer Yes _____ Spouse Yes _____

- 2) Are you receiving annuity payments as a surviving spouse, or other named beneficiary, pursuant to a United States Department of Defense Survivor Benefit Plan?

Tax Payer Yes _____ Spouse Yes _____

If either or both the above apply to you, then you are eligible for a California exclusion of up to \$20,000 for each that apply to you, subject to income limits. If either or both of the above apply to your spouse, then your spouse is eligible for a California exclusion up to \$20,000 for each that apply to them, subject to income limits.

Your Federal AGI must be less than \$125,000 (\$250,000 for a surviving spouse or MFJ).

Please keep a copy of this sheet in your AARP Tax Envelope

For Tax-Aide Use

1099-R

Payer: Defense Finance and Accounting Service

Payer's TIN: 34-0727612

- Enter 1099-R in TaxSlayer
- Before **e-file**, after all other income and deductions have been entered, verify:
 - Federal AGI is below the threshold of \$125,000, \$250,000 for surviving spouse or MFJ
- If AGI is below the limits go to:
 - State Section -> Subtractions from Income
 - Enter amount of exclusion under Pensions and Annuities:
The lesser of the amount in 1099-R Box 2a OR \$20,000
- Add a TaxSlayer Note