

2020

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

3805P

Form header with fields for First name, Initial, Last name, SSN or ITIN, Address, Apt. no./Ste. no., City, State, ZIP Code, and a checkbox for amended form.

Part I Additional Tax on Early Distributions - Complete this part if you received a taxable distribution, before you reached age 59 1/2, from a qualified retirement plan (including an IRA) or modified endowment contract.

Form lines 1-4 for Part I: 1 Early distributions included in income, 2 Early distributions not subject to tax, 3 Amount subject to tax, 4 Tax due.

* If any part of the amount on line 3 was a distribution from a SIMPLE IRA, you may have to include 6% (.06) of that amount on line 4 instead of 2 1/2% (.025). See instructions.

Part II Additional Tax on Certain Distributions from Education Accounts and ABL Accounts - Complete this part if you included an amount in income on Schedule CA (540 or 540NR) from a Coverdell education savings account (ESA), a qualified tuition program (QTP), or an ABL account.

Form lines 5-8 for Part II: 5 Distributions included in income, 6 Distributions not subject to tax, 7 Amount subject to tax, 8 Tax due.

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.

Form lines 9-11 for Part III: 9 Taxable Archer MSA distribution, 10a/b Other exceptions, 11 Additional tax due from Medicare Advantage MSA distributions.

Signature. Complete only if you are filing this form by itself and not with your tax return.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Your signature

X

Signature of paid preparer (declaration of preparer is based on all information of which preparer has any knowledge.)

Date

PTIN

Firm's name (or yours if self-employed) and address

Firm's FEIN