Combined Disposable Income Worksheet

Income year:		
Are you required to file a federal income tax return?	Yes	No
Disposable income	Amount	
1. Federal adjusted gross income from Federal Form 1040		
2. Capital gains not reported on your federal income tax return		
3. Losses reported on your federal income tax return		
4. Depreciation reported on your federal income tax return		
5. Wage income: nontaxable and/or not reported on your federal income tax return		
6. Dividend or interest income: nontaxable and/or not reported on your federal income tax return		
7. Pension and annuity income:nontaxable and/or not reported on your federal income tax return		
8. Military pay and benefits: nontaxable and/or not reported on your federal income tax return		
9. Veterans pay and benefits: nontaxable and/or not reported on your federal income tax return		
10. Social security or railroad retirement benefits: nontaxable and/or not reported on your federal income tax return		
11. Business, rental, or farming income not reported on your federal income tax return		
12. Other income not included in amounts on Lines 1-11, provide the source, type and amount		
13. Add lines 1-12 This is your total disposable income:		
<u>Deductions</u>		
14. Nursing home, assisted living or adult family home		
15. Home health care		
16. Prescription drugs		
17. Medicare parts A,B,C, D insurance premiums		
18. Medicare supplemental/Medigap insurance premiums		
19. Durable medical and mobility enhancing equipment and prosthetic devices		
20. Medically prescribed oxygen		
21. Long-term care insurance		
22. Cost-sharing amounts		
23. Nebulizers		
24. Medicines of mineral, animal and botanical origin prescribed, administered, dispensed, by a naturopath licensed under Washington law		
25. Ostomic items		
26. Insulin for human use		
27. Kidney dialysis devices		
28. Disposable devices used to deliver drugs for human use		
29. Adjustments to income		
30. Add lines 14-29 This is your total deductions:		
31. Subtract line 30 from line 13 This is your total combined disposable income:		

REV 63 0036 (1/27/22) Page 5 of 5

Income Example #13

Documentation provided: Tax return, no schedule D, 1099-R

AGI is found on line 11 -

\$13,743.00

*Let's go add the ones we know first, we will revisit Line 5

SSA is on line 6 - \$37,203.00

SSA gross amount: 37,341

SSA taxable amount: 138

Difference: 37,203

Line 7: Capital Gain or (loss) <3,000>

*Note on return says to take loss as is, add back entire amount \$ 3,000.00

Now let's revisit Line 5

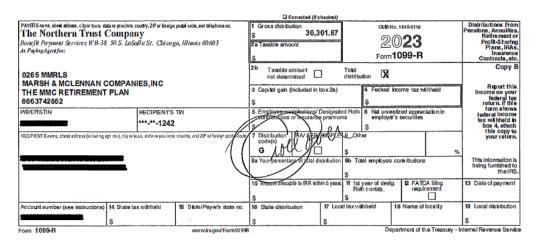
Pension/Annuity:

Pension gross amount: 30,301

Pension taxable amount: 0

Difference: 30,301 – do we add this back?

Let's look at the 1099-R



No, we do not. This is another example of a pension rollover, with the distribution code G.

Total disposable income

\$53,946.00