

2011

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

3805P

Form header section 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 return.

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.

Table with 2 columns: Description and Amount. Rows include: 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 Distributions from Coverdell Education Savings Accounts (ESAs) or Qualified Tuition Programs (QTPs) Not Used for Educational Expenses - Complete this part if a distribution was made from your Coverdell ESA or QTP and was not used for educational expenses.

Table with 2 columns: Description and Amount. Rows include: 5 Distributions included in income from Coverdell ESAs or QTPs, 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.

Table with 2 columns: Description and Amount. Rows include: 9 Taxable Archer MSA distribution, 10a/b Exceptions to 10% tax, 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.

Signature section with fields for Your signature, Date, Signature of paid preparer, PTIN, and Firm's name (or yours if self-employed) and address, FEIN.