

Earlier Year Tax Return Smart Worksheet

*If the box on line A of the Earlier Year Filing Status Smart Worksheet is checked (a joint return was filed in **both** 2014 **and** the earlier year with the **same** spouse), enter the earlier year tax return information in the Taxpayer column only and make no entries in the Spouse column.*

Enter the information below from the **earlier year tax return**.
(Enter zero if there is no amount on the earlier year tax return)

- A** Enter the adjusted gross income
- B** Enter the total of any adjustments/exclusions claimed for
 - Adoption benefits (Form 8839)
 - Qualified U. S. savings bond interest (Form 8815)
 - Student loan interest
 - Tuition and fees
 - Domestic production activities
 - Foreign earned income or housing (Form 2555)
 - Certain income of bona fide residents of American Samoa or Puerto Rico
- C** Enter tax-exempt interest received
- D** Enter **taxable** social security benefits reported in the **earlier year** (Form 1040 line 20b or Form 1040A line 14b. See Help for earlier years prior to 2000)..

Taxpayer (or Joint)	Spouse

QuickZoom to another Worksheet to enter lump-sum payment for another year ▶