Federal Carryover Worksheet   2018

► Keep for your records

Name(s) Shown on Return	Social Security Number

2017 State and Local Income Tax Information

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With-held/Pmts	(e) Paid With Return	(f) Total Over-payment	(g) Applied Amount
Totals . .						

2017 State Extension Information

(a) State	(b) Paid With Extension

2017 Locality Extension Information

(a) Locality	(b) Paid With Extension

2017 State Estimates Information

(a) State	(c) Estimates Paid After 12/31

2017 Locality Estimates Information

(a) Locality	(c) Estimates Paid After 12/31

2017 State Taxes Due Information

(a) State	(e) Paid With Return

2017 Locality Taxes Due Information

(a) Locality	(e) Paid With Return

2017 State Refund Applied Information

(a) State	(g) Applied Amount

2017 Locality Refund Applied Information

(a) Locality	(g) Applied Amount

2017 State Tax Refund Information

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment

2017 Locality Tax Refund Information

(a) Locality	(d) Total Withheld/Pmts	(f) Total Overpayment

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Other Tax and Income Information		2017	2018
1	Filing status 1		
2	Number of exemptions for blind or over 65 (0 - 4). 2		
3	Itemized deductions 3		
4	Check box if required to itemize deductions 4	☐	☐
5	Adjusted gross income 5		
6	Tax liability for Form 2210 or Form 2210-F 6		
7	Alternative minimum tax. 7		
8	Federal overpayment applied to next year estimated tax. 8		

QuickZoom to the IRA Information Worksheet for IRA information . . . . ▶

Excess Contributions		2017	2018
9 a	Taxpayer's excess Archer MSA contributions as of 12/31 . . . . 9 a		
b	Spouse's excess Archer MSA contributions as of 12/31 . . . . . b		
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31. . . 10 a		
b	Spouse's excess Coverdell ESA contributions as of 12/31. . . . b		
11 a	Taxpayer's excess HSA contributions as of 12/31 . . . . 11 a		
b	Spouse's excess HSA contributions as of 12/31 . . . . b		

Loss and Expense Carryovers
Note: Enter all entries as a positive amount

		2017	2018
12 a	Short-term capital loss. . . . . 12 a		
b	AMT Short-term capital loss . . . . b		
13 a	Long-term capital loss . . . . 13 a		
b	AMT Long-term capital loss. . . . . b		
14 a	Net operating loss available to carry forward . . . . 14 a		
b	AMT Net operating loss available to carry forward . . . . b		
15 a	Investment interest expense disallowed . . . . 15 a		
b	AMT Investment interest expense disallowed . . . . b		
16 Nonrecaptured net Section 1231 losses from:	a 2018 . . . 16 a	▓▓▓▓	
	b 2017 . . . b		
	c 2016 . . . c		
	d 2015 . . . d		
	e 2014 . . . e		
	f 2013 . . . f		▓▓▓▓
17 AMT ▓▓▓▓ net Sec 1231 losses from:	a 2018 . . . 17 a	▓▓▓▓	
	b 2017 . . . b		
	c 2016 . . . c		
	d 2015 . . . d		
	e 2014 . . . e		
	f 2013 . . . f		▓▓▓▓

Credit Carryovers				2017	2018
18	General business credit	18			
19	Adoption credit from:	a	2018	19a		
		b	2017	b		
		c	2016	c		
		d	2015	d		
		e	2014	e		
		f	2013	f		
20	Mortgage interest credit from:	a	2018	20a		
		b	2017	b		
		c	2016	c		
		d	2015	d		
21	Credit for prior year minimum tax	21			
22	District of Columbia first-time homebuyer credit	22			
23	Residential energy efficient property credit	23			

Other Carryovers				2017	2018
24	Section 179 expense deduction disallowed	24			
25	Excess	a	Taxpayer (Form 2555, line 46)	25a		
	foreign	b	Taxpayer (Form 2555, line 48)	b		
	housing	c	Spouse (Form 2555, line 46)	c		
	deduction:	d	Spouse (Form 2555, line 48)	d		

Charitable Contribution Carryovers

26	2017 Carryover of charitable contributions from:	Other Property		Capital Gain		Cash
		(a) 50%	**(b)** 30%	**(c)** 30%	**(d)** 20%	**(e)** 60%
a	2017					
b	2016					
c	2015					
d	2014					
e	2013					

27	2018 Carryover of charitable contributions from:	Other Property		Capital Gain		Cash
		(a) 50%	**(b)** 30%	**(c)** 30%	**(d)** 20%	**(e)** 60%
a	2018					
b	2017					
c	2016					
d	2015					
e	2014					

28   Amount overpaid less earned income credit . . . . _____

2017 State Capital Loss Carryovers (For users **not** transferring from the prior year)

State ID	Short-term Capital Loss for State	AMT Short-term Capital Loss for State	Long-term Capital Loss for State	AMT Long-term Capital Loss for State	Capital Loss (combined) for State	AMT Capital Loss (combined) for State