

Worksheet D
Other Retirement Income Exclusion

Age Requirement: 62 or older

Part-year residents, do **not** complete this worksheet. See instructions on page 6.

Part I – Unclaimed Pension Exclusion

Is total income from Line 26, NJ-1040 for the entire year **MORE than \$100,000?**

- Yes. Do not complete Part I. Enter “0” on line 8 and continue with Part II.
 No. Continue with line 1.

1. Enter the amount from Line 14, NJ-1040 1. _____
2. Enter the amount from Line 17, NJ-1040 2. _____
3. Enter the amount from Line 20, NJ-1040 3. _____
4. Enter the amount from Line 21, NJ-1040 4. _____
5. Add lines 1, 2, 3, and 4 5. _____

Is the amount on line 5 MORE than \$3,000?

- Yes. Enter “0” on line 8 and continue with Part II.
 No. Continue with line 6.

6. **Enter: if your filing status is:**
\$20,000 Married/CU couple, filing joint return
\$15,000 Single; Head of household; Qualifying widow(er)/
surviving CU partner
\$10,000 Married/CU partner, filing separate return 6. _____
7. Enter the amount from Line 27a, NJ-1040 7. _____
8. Unclaimed Pension Exclusion. Subtract line 7 from line 6.
If zero, enter “0.” Continue with Part II 8. _____

Part II – Special Exclusion

9a. Are you (and/or your spouse/civil union partner if filing jointly) now receiving, or will you (and/or your spouse/civil union partner if filing jointly) ever be eligible to receive Social Security or Railroad Retirement Benefits?

- No — Continue with item 9b
 Yes — Enter “0” on line 9 and continue with line 10

9b. Would you (and your spouse/civil union partner if filing jointly) be receiving or ever be eligible to receive Social Security or Railroad Retirement Benefits if you had participated in either program?

- No — Enter “0” on line 9 and continue with line 10
 Yes — Enter on line 9 the amount of exclusion for your
filing status shown below and continue with line 10

- Enter: if your filing status is:**
\$ 6,000 Married/CU couple, filing joint return; Head of household;
Qualifying widow(er)/surviving CU partner
\$ 3,000 Single; Married/CU partner, filing
separate return 9. _____

10. Your Other Retirement Income Exclusion

Add lines 8 and 9. Enter here and on Line 27b, NJ-1040.
If the amount here is zero, make no entry on Line 27b 10. _____

(Keep for your records)