

2021

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

3805P

Form header 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 form.

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.

Form lines 1-4 for Part I: 1 Early distributions included in income, 2 Early distributions not subject to additional tax, 3 Amount subject to additional 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 Certain Distributions from Education Accounts and ABLA Accounts - Complete this part if you included an amount in income on Schedule CA (540 or 540NR) from a Coverdell education savings account (ESA), a qualified tuition program (QTP), or an ABLA account.

Form lines 5-8 for Part II: 5 Distributions included in income, 6 Distributions not subject to additional tax, 7 Amount subject to additional 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.

Form lines 9-11 for Part III: 9 Taxable Archer MSA distribution, 10a/b Other exceptions to the 12.5% 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.

Your signature Date

X Signature of paid preparer (declaration of preparer is based on all information of which preparer has any knowledge.) PTIN

Firm's name (or yours if self-employed) and address Firm's FEIN