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OPEN ENROLLMENT INCOME WORKSHEET

To better prepare for our open enrollment call and update your application to see if you are eligible for any premium subsidy assistance, please fill out the attached worksheet and send back to me prior to our call.

Household Tax Filing Info

- | | | |
|-------------------------------------|-----------|----------|
| 1) Are you Married? | Yes _____ | No _____ |
| 2) Do you file Jointly | Yes _____ | No _____ |
| 3) How many Dependents do you claim | _____ | |

Estimate of 2025 Gross Household Income _____

(Please Use Worksheet Below to Calculate)

TYPES OF INCOME TO REPORT-Please use the Worksheet below to breakout your sources of income as the Marketplace requires that sources of income be itemized and listed separately in the application. Always list GROSS amounts unless instructed otherwise.

	YOU	SPOUSE
Federal Gross Taxable Wages (from your job)	_____	_____
Self- Employment Income	_____	_____
(Please provide net amount after you have deducted business expenses)		
Unemployment Compensation	_____	_____
Social Security Income	_____	_____
Social Security Disability Income (SSDI)	_____	_____
(Do NOT include Supplemental Security Income (SSI))		
Retirement or Pension Income	_____	_____
Alimony or Maintenance Income	_____	_____

(Do NOT Include Child Support)

Capital Gains _____

(Examples would be selling a property)

Investment Income _____

(This includes any distributions from IRA's, Annuity, Interest and Dividends earned on investments usually these are reflected by tax documents like 1099 -DIV, 1099 R, 1099 INT- Note: ROTH IRA Distributions are not taxable)

Rental and Royalty Income _____

(Rental Income should be Net amount after you have deducted any expenses)

Business Income from C -Corp or S- Corp or Partnerships: _____

(If you are a business that income is usually reported on your Personal Tax return 1040- sources of this type of income include 1099, K1's, Schedule C or 1120S – look at past tax returns or consult a tax professional to ask how your Business Income was reported on your 1040)

The following do not need to be included: Child Support, SSI, Qualified Distributions from a Designated Roth, Gifts, Veterans Disability Payments, Workers Compensation, Proceeds from Loans.