



TRIVETT WEALTH MANAGEMENT

2019 IRS DOLLAR LIMITATIONS

Account Types		2018	2019
IRA	Traditional and Roth	\$5,500	\$6,000
	Catch-up for 50+	\$1,000	\$1,000
SIMPLE	Employee Contribution	\$12,500	\$13,000
	Catch-up for 50+	\$3,000	\$3,000
	Maximum Employer Match (\$1 for \$1 of the first 3% of employee compensation withheld)	\$12,500	\$13,000
	Maximum Employer Non-Elective Contribution	\$5,500	\$5,600
SEP	SEP Contribution Limit	\$55,000	\$56,000
	SEP Compensation Exclusion	\$600	\$600
401(k), 403(b) and Governmental 457(b)	Employee Contribution	\$18,500	\$19,000
	Catch-up for 50+	\$6,000	\$6,000
Profit Sharing, 401(k) and Money Purchase Pension	Defined Contribution Limit (415 (c) limit)	\$55,000	\$56,000
	Employee Annual Compensation Limit	\$275,000	\$280,000

Traditional IRA Deduction		
Filing Status	2018	2019
Single or Head of Household	\$63,000-\$73,000	\$64,000-\$74,000
Married Filing Jointly	\$101,000-\$121,000	\$103,000-\$123,000
Married Filing Jointly (non-covered spouse)	\$189,000-\$199,000	\$193,000-\$203,000

Roth IRA Contributions		
Filing Status	2018	2019
Single or Head of Household	\$120,000-\$135,000	\$122,000-\$137,000
Married Filing Jointly	\$189,000-\$199,000	\$193,000-\$203,000

529/Gift Tax Exclusion		
Filing Status	2018	2019
Single or Head of Household	\$15,000	\$15,000
Married Filing Jointly	\$30,000	\$30,000

Health Savings Accounts (HSA)		2018	2019
Maximum Contribution Limit	Single	\$3,450	\$3,500
	Family	\$6,900	\$7,000
	Catch-up (55 by the end of the year)	\$1,000	\$1,000
Minimum Annual Deductible for HDHP	Single	\$1,350	\$1,350
	Family	\$2,700	\$2,700
HDHP Maximum Out-of-Pocket	Single	\$6,650	\$6,750
	Family	\$13,300	\$13,500

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