

TAX RETURN SOCIAL SECURITY BENEFITS WORKSHEET

Personal Information

Full Name: _____

Social Security Number (Last 4 digits): _____

Tax Year: _____

Filing Status: Single Married Filing Jointly Head of Household Qualifying Widow(er)

Step-by-Step Worksheet (Based on IRS Guidelines)

1. Total Social Security benefits received (Box 5 of Form SSA-1099): _____
2. Benefits repaid (if any): _____
3. Net Social Security benefits (Line 1 - Line 2): _____
4. Adjusted Gross Income (excluding Social Security): _____
5. Nontaxable interest (e.g., municipal bond interest): _____
6. Add Lines 4 and 5: _____
7. Enter 50% of Line 3: _____
8. Add Lines 6 and 7 — This is your provisional income: _____

IRS Base Amounts for Taxation

- \$25,000 for Single, Head of Household, or Qualifying Widow(er)
- \$32,000 for Married Filing Jointly
- \$0 for Married Filing Separately (if lived with spouse at any time during the year)

Final Step

Use IRS Publication 915 Worksheet 1 or tax software to calculate the taxable portion of your benefits.

Enter the taxable amount on Form 1040 – Line 6b

Estimated Taxable Social Security Benefits: _____