

# Taxable Social Security Benefits Worksheet

## Social Security and Other Income

Annual Social Security Benefits: \_\_\_\_\_

½ of Social Security Benefits: \_\_\_\_\_

Other Income (wages, pension, interest, etc.): \_\_\_\_\_

Nontaxable Interest (if any): \_\_\_\_\_

## Provisional Income Calculation

Adjusted Gross Income (AGI): \_\_\_\_\_

+ Nontaxable Interest: \_\_\_\_\_

+ ½ of Social Security Benefits: \_\_\_\_\_

= Provisional Income: \_\_\_\_\_

## Compare With IRS Threshold

Filing Status (Check One):

Single / Head of Household → \$25,000

Married Filing Jointly → \$32,000

If Provisional Income is over the base amount:

- Up to 50% or 85% of Social Security benefits may be taxable.
- Refer to IRS Publication 915 or use online calculators.

## Notes:

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