

1. *What is the purpose of this study?*  
 2. *What are the research objectives?*  
 3. *What is the research methodology?*  
 4. *What are the results of the study?*  
 5. *What are the conclusions of the study?*  
 6. *What are the limitations of the study?*  
 7. *What are the implications of the study?*  
 8. *What are the future research directions?*  
 9. *What are the contributions of the study?*  
 10. *What are the key findings of the study?*  
 11. *What are the main results of the study?*  
 12. *What are the primary outcomes of the study?*  
 13. *What are the secondary outcomes of the study?*  
 14. *What are the tertiary outcomes of the study?*  
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See Next Page

**Box 3—"Benefits Paid in 2024"**— shows the total amount of Social Security we paid you in 2024. This amount may not agree with the payments you actually received in 2024. This is because it may include money we withheld or deductions such as Medicare Part B (medical insurance) premiums, Medicare Advantage or prescription drug coverage premiums you requested to be withheld from your benefits, and any income-related monthly adjustment amount you are required to pay for Part B or prescription drug coverage. Also, it may leave out some payments that are not taxed by the IRS. All items that apply to you are listed in the "Description of Amount in Box 3."

**Note:** If you have a "Treasury Benefit Payment Offset, Garnishment and/or Tax Levy" amount shown and need to know what type of offset is involved, contact SSA at 1-800-772-1213 for an explanation. If you have a tax debt question, call IRS at 1-800-829-1040. Any payments we made to you in 2024 for earlier years are shown in a separate column.

**Box 4—"Benefits Repaid to SSA in 2024"**—shows the total amount of benefits you repaid us in 2024. We show items that apply to you in the column headed "Description of Amount in Box 4."

**Box 5—"Net Benefits for 2024"**— shows the amount in Box 3 minus the amount in Box 4. An amount in parentheses is a negative amount. Enter this amount on line A of IRS notice 703 to see if any of your Social Security benefits are taxable.

**Box 6—"Voluntary Federal Income Tax Withheld"**— shows the total amount of benefits you voluntarily withheld and paid for Federal income tax. Include this amount on your income tax return as tax withheld.

## If You Have Any Questions

If you have any questions about the amounts on this form, call Social Security at 1-800-772-1213 or visit any Social Security office. Please have this form with you. Please use the claim number shown in **Box 8** if you contact SSA. If you have questions about how to figure the taxable part of your Social Security benefits after you complete Notice 703, visit IRS.gov and enter "Social Security income" in the search box.

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## Facts About Computer Matching

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Congress passed a law (PL 100-503) in 1988 that says you have a right to know that we may use information you give us when we match records by computer. Below, we tell you about computer matching and how it may affect you.

## What Are Computer Matching Programs?

Computer matching programs compare Social Security and/or Medicare records with those of other Federal, State, or local government agencies. Many agencies may use matching programs to find or prove that a person qualifies for benefits paid by the Federal Government.

## How Do Computer Matching Programs Affect You?

On forms that you fill out for us you give us information about yourself. Sometimes, we check the information you, and others, give us. We use computer matching to do the checking. The law allows us to check this way even if you do not agree to it. We may also share information about you with other government agencies that pay benefits. They will use this information in their computer matching programs.



## **If You Want More Facts**

If you want to learn more about computer matching or how we use information about you, please contact any Social Security office.

## **Read This To See if Your Social Security Benefits May Be Taxable**

If your social security and/or SSI (supplemental security income) benefits were your only source of income for 2024, you probably will not have to file a federal income tax return. See IRS Pub. 501, Dependents, Standard Deduction, and Filing Information, or your tax return instructions to find out if you have to file a return.

# FORM SSA-1099SM - SOCIAL SECURITY BENEFIT STATEMENT

<b>2024</b>	<ul style="list-style-type: none"><li>PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME</li><li>SEE THE REVERSE FOR MORE INFORMATION</li></ul>		
Box 1. Name JOHN L CARON		Box 2. Beneficiary's Social Security Number 566-92-4752	
Box 3. Benefits Paid in 2024 \$50,960.40	Box 4. Benefits Repaid to SSA in 2024 NONE	Box 5. Net Benefits for 2024 (Box 3 minus Box 4) \$50,960.40	
<b>DESCRIPTION OF AMOUNT IN BOX 3</b>  Paid by check or Direct deposit \$48,864.00  Medicare part B premiums deducted from your benefits \$2,096.40  Total Additions \$50,960.40  Benefits for 2024 \$50,960.40		<b>DESCRIPTION OF AMOUNT IN BOX 4</b>  NONE	
		Box 6. Voluntary Federal Income Tax Withheld NONE	
		Box 7. Address  JOHN L CARON 874 SUNSHINE CANYON DR BOULDER CO 80302-9727	
		Box 8. Claim Number (Use this number if you need to contact SSA.)  566-92-4752A	

DO NOT RETURN THIS FORM TO SSA OR IRS