

**FORM SSA-1099 -- SOCIAL SECURITY BENEFIT STATEMENT**

2020

- PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
- SEE FACTS ABOUT YOUR 2020 SOCIAL SECURITY BENEFIT STATEMENT AND NOTICE 703 FOR MORE INFORMATION.

Box 1. Name HENRY HERALD		Box 2. Beneficiary's Social Security Number 285-54-4247
Box 3. Benefits paid in 2020 \$16,285.20	Box 4. Benefits Repaid to SSA in 2020 NONE	Box 5. Net Benefits for 2020 (Box 3 minus Box 4) \$16,285.20

DESCRIPTION OF AMOUNT IN BOX 3		DESCRIPTION OF AMOUNT IN BOX 4
Paid by check or Direct deposit	\$16,285.20	NONE
Medicare Part B premiums deducted from your benefits	\$289.20	
Total Additions	\$16,574.40	
SUBTRACT:		
Non-Taxable payments	\$289.20	
Benefits for 2020	\$16,285.20	
		Box 6. Voluntary Federal Income Tax Withheld NONE
		Box 7. Address HENRY HERALD 222 E ELFIN GRN PORT HUENEME CA 93041-1908
		Box 8. Claim Number (Use this number if you need to contact SSA.) 285-54-4247A

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## Facts About Your 2020 Social Security Benefit Statement

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Your 2020 Social Security Benefit Statement is enclosed with this form. Use it, along with the information below, to see if part of your Social Security benefits may be taxable.

### What You Need to Do

Use the 2020 statement with the Internal Revenue Service (IRS) Notice 703 on the reverse, to see if any part of your Social Security benefits are taxable. Do not return this form to us or to the IRS. Do not attach it to your income tax return. Keep the original for your records. We also are sending this benefit information to the IRS. We did not include your SSI benefits, if any, on this statement. You may wish to keep this statement as proof of your income for use with public assistance. If you do not receive public assistance and you do not owe taxes on your Social Security benefits, you may ignore this form.

### Who Receives This Statement

We must, by law, send you a statement that shows the Social Security benefits you received or repaid in 2020. We send separate statements to each person when we combine your check with another person's check. If you get more than one check each month, we may send you more than one statement.

### Explanations of Items

**Box 1—"Name,"**— shows the name of the person for whom we paid benefits.

**Box 2—"Social Security Number,"**— shows the Social Security number of the person shown in Box 1 if we have the number.

**Box 3—"Benefits Paid in 2020,"**— shows the total amount of Social Security we paid you in 2020. This amount may not agree with the payments you actually received in 2020. This is because it may include money we withheld for 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 the IRS at 1-800-829-1040.

Any payments we made in 2020 for earlier years are shown in a separate column.

**Box 4—"Benefits Repaid to SSA in 2020,"**— shows the total amount of benefits you repaid us in 2020. We show items that apply to you in the column headed "Description of Amount in Box 4."

**Box 5—"Net Benefits for 2020,"**— 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 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. 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](https://www.irs.gov) and enter "social security income" in the search box.

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## Facts About Computer Matching Programs

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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 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.

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