


Worksheet - Social Security Benefits AreTaxable

1. Enter the amount from **box 5** of **all** your **Forms SSA-1099**
and **Forms RRB-1099** 1.

2. Is the amount on line 1 more than zero?

☐ **No.**  None of your social security benefits are taxable.

☐ **Yes.** Enter one-half of line 1 2.

3. Enter your total wages, salaries, tips, etc., from Form(s) W-2. Also, include any taxable unemployment compensation and Alaska Permanent Fund dividends you received (see the instructions for Form 1040EZ, line 3, later) 3.

4. Enter your total interest income, including any tax-exempt interest 4.

5. Add lines 2, 3, and 4 5.

6. If you are:

- Single, enter \$25,000
- Married filing jointly, enter \$32,000

}

.....

6.

7. Is the amount on line 6 less than the amount on line 5?

☐ **No.** None of your social security or railroad retirement benefits are taxable this year. You can use Form 1040EZ. **Do not** list your benefits as income.

☐ **Yes.**  Some of your benefits are taxable this year. You **must** use Form 1040A or 1040.