

RETIRED INDIVIDUAL TAX RETURN

Form SR-1040 (Simplified Senior Tax Template)

1. TAXPAYER INFORMATION

FIRST NAME & INITIAL	
LAST NAME	
SOCIAL SECURITY NUMBER (SSN)	
DATE OF BIRTH	
HOME ADDRESS (NUMBER AND STREET)	
APT / SUITE	
CITY, TOWN, OR POST OFFICE	
STATE	
ZIP CODE	

2. FILING STATUS & AGE EXEMPTIONS

- ☐ Single
- ☐ Married Filing Jointly
- ☐ Married Filing Separately
- ☐ Qualifying Surviving Spouse

Age/Blindness Standard Deduction Status:

- ☐ Taxpayer is 65 or older
- ☐ Taxpayer is blind
- ☐ Spouse is 65 or older
- ☐ Spouse is blind

3. RETIREMENT INCOME

1. Taxable Interest <i>Attach Schedule B if required</i>	
2. Ordinary Dividends	
3. IRA Distributions <i>Taxable Amount</i>	
4. Pensions and Annuities <i>Taxable Amount</i>	
5. Social Security Benefits <i>Taxable Amount</i>	
6. Other Retirement Income / Capital Gains	
7. TOTAL RETIREMENT INCOME (Add Lines 1 through 6)	

4. DEDUCTIONS & TAXABLE INCOME

8. Standard Deduction or Itemized Deductions <i>Include additional amount for age 65 or older / blindness</i>	
9. Charitable Contributions <i>Non-itemizer deduction (if applicable)</i>	
10. TAXABLE INCOME (Subtract Lines 8 and 9 from Line 7. If zero or less, enter 0)	

5. TAX, CREDITS & PAYMENTS

11. Total Tax Liability	
12. Credit for the Elderly or the Disabled <i>Attach Schedule R</i>	
13. Federal Income Tax Withheld <i>From Forms 1099-R, SSA-1099, or W-2</i>	
14. Estimated Tax Payments	
15. REFUND AMOUNT (If Line 13 + Line 14 is greater than Line 11 - Line 12)	
16. AMOUNT YOU OWE (If Line 11 - Line 12 is greater than Line 13 + Line 14)	

DECLARATION & SIGNATURES

TAXPAYER'S SIGNATURE

DATE

SPOUSE'S SIGNATURE (IF JOINT RETURN)

DATE