

TAX RETURN FOR RETIRED INDIVIDUALS

Annual Information Return

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1. PERSONAL INFORMATION

FIRST NAME AND MIDDLE INITIAL _____

LAST NAME _____

SOCIAL SECURITY NUMBER (SSN) _____

DATE OF BIRTH _____

HOME ADDRESS (NUMBER AND STREET) _____

APARTMENT / SUITE NUMBER _____

CITY, TOWN, OR POST OFFICE _____

STATE _____

ZIP CODE _____

2. FILING STATUS & AGE EXEMPTIONS

FILING STATUS: ☐ Single ☐ Married Filing Jointly ☐ Married Filing Separately ☐ Head of Household ☐ Qualifying Surviving Spouse

AGE EXEMPTIONS (BORN BEFORE JAN 2, 1960): ☐ Self ☐ Spouse

3. RETIREMENT INCOME

Line	Type of Income	Amount (\$)
1	Social Security Benefits (Form SSA-1099)	
2	Taxable Social Security Benefits	
3	IRA Distributions (Form 1099-R)	
4	Pensions and Annuities	
5	Taxable Interest Income (Form 1099-INT)	
6	Ordinary Dividends (Form 1099-DIV)	
7	Other Income (Capital Gains, Business, etc.)	
8	TOTAL RETIREMENT INCOME (Add Lines 2 through 7)	

4. DEDUCTIONS & TAXABLE INCOME

9	Standard Deduction (Include Additional Deduction for Age 65 or Older)	
10	Total Itemized Deductions (If greater than Standard Deduction)	
11	TAXABLE INCOME (Subtract Line 9 or 10 from Line 8; if zero or less, enter 0)	

5. CREDITS, TAXES & PAYMENTS

12	Credit for the Elderly or the Disabled (Schedule R)	
13	Total Tax Liability	
14	Federal Income Tax Withheld (From 1099-R, SSA-1099, etc.)	
15	Estimated Tax Payments Made	
16	REFUND AMOUNT (If Line 14 + Line 15 is greater than Line 13)	
17	AMOUNT YOU OWE (If Line 13 is greater than Line 14 + Line 15)	

DECLARATION & AUTHORIZATION

Under penalties of perjury, I declare that I have examined this return and accompanying schedules, and to the best of my knowledge and belief, they are true, correct, and complete.

YOUR SIGNATURE

DATE

SPOUSE'S SIGNATURE (IF JOINT)

DATE

PAID PREPARER'S SIGNATURE

DATE

PTIN / FIRM NAME

PHONE NUMBER