

Form SSA-1099 Distributions



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Social Security SSA-1099/RRB-1099 Tier I

Taxpayer's Social Security Benefit (Generally Box 5 of Form SSA-1099)
\$

Taxpayer's Federal Tax Withheld (Amount from Box 6 of Form SSA-1099)
\$

Taxpayer's Medicare Premiums
\$

Spouse's Social Security Benefit (Generally box 5 of Form SSA-1099)
\$

Spouse's Federal Tax Withheld (Amount from Box 6 of Form SSA-1099)
\$

Spouse's Medicare Premiums
\$

Lump-Sum Payments

Enter amount from Box 5 of Form SSA-1099 or from Form RRB-1099 - Tier 1 (Blue form) Net Social Security Equivalent Benefits (SSEB).

Be sure to check for any tax withheld. Often taxpayers choose this option. This is found in box 6 of the SSA-1099 and box 10 of the RRB-1099.

Enter the total of Medicare Parts A, B, C, and D. Repeat for spouse.

If an amount is present in the description of Box 3 on Form SSA-1099, or boxes 7, 8 and 9 on Form RRB-1099, the taxpayer received benefits attributable to a prior year. If the taxpayer is able to provide prior year tax returns, use the Social Security Lump-Sum Payment worksheet on the next page to see if the taxable amount of social security is reduced.