

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2023

• PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
• SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name

HENRY V SIMON

Box 2. Beneficiary's Social Security Number

669-30-1405

Box 3. Benefits Paid in 2023

*\$23,905.00

Box 4. Benefits Repaid to SSA in 2023

NONE

Box 5. Net Benefits for 2023 (Box 3 minus Box 4)

\$23,905.00

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or Direct deposit

\$23,905.00

Benefits for 2023

\$23,905.00

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

NONE

Box 7. Address

HENRY V SIMON
71 TONJES ROAD
CALLICOON NY 12723-5729

*INCLUDES:

\$6,625.00

Paid in 2023 for 2022

Box 8. Claim Number (Use this number if you need to contact SSA.)

106-50-1158C1

Notice 703

(Rev. October 2023)



Department of the Treasury
Internal Revenue Service

Read This To See if Your Social Security Benefits May Be Taxable

If your social security and/or SSI (supplemental security income) benefits were your only source of income for 2023, you probably will not have to file a federal income tax return. See IRS Pub. 501, Dependents, Standard Deduction, and Filing Information, or your tax return instructions to find out if you have to file a return.

We developed this worksheet for you to see if your benefits may be

taxable for 2023. Fill in lines A through E.

Do not use the worksheet below if **any** of the following apply to you; instead, go directly to IRS Pub. 915, Social Security and Equivalent Railroad Retirement Benefits.

- You received Form RRB-1099, Form SSA-1042S, or Form RRB-1042S.

- You exclude income from sources outside the United States or foreign housing, income earned by bona fide residents of American Samoa or Puerto Rico, interest income from series EE or I U.S. savings bonds issued after 1989, or employer-provided adoption benefits.

Note. If you plan to file a joint income tax return, include your spouse's amounts, if any, on lines A, C, and D.

A. Enter the total amount from box 5 of ALL your 2023 Forms SSA-1099.

Include the full amount of any lump-sum benefit payments received in 2023, for 2023 and earlier years.

A. _____

B. _____

B. Multiply line A by 50% (0.50).

C. _____

D. _____

C. Enter your total income that is taxable (excluding line A), such as pensions, wages, interest, ordinary dividends, and capital gain distributions. Do not reduce your income by any deductions, exclusions, or exemptions.

E. _____

D. Enter any tax-exempt interest, such as interest on municipal bonds.

E. Add lines B, C, and D, and enter the total here. Then, read the information below.

Part of your social security benefits may be taxable if, for 2023, item 1, 2, or 3 below applies to you.

1. You were single, a head of household, or a qualifying surviving spouse and line E above is more than \$25,000.

2. You were married, would file jointly, and line E above is more than \$32,000.

3. You were married, would file separately, and line E above is more than zero (more than \$25,000 if you lived apart from your spouse for all of 2023).

If your figures show that part of your benefits may be taxable, see IRS Pub. 915 and *Social Security Benefits* in your 2023 federal income tax return instructions.

If **none** of your benefits are taxable, but you must otherwise file a tax return, do the following.

- Enter the total amount from line A above on Form 1040 or 1040-SR, line 6a, **and** enter -0- on Form 1040 or 1040-SR, line 6b.
- If you were married, file separately, and lived apart from your spouse for all of 2023, enter "D" to the right of the word "benefits" on Form 1040 or 1040-SR, line 6a.

Railroad Retirement Benefits, for rules on a lump-sum election you can make that may reduce the amount of your taxable benefits.

Get More Information From the IRS

If you still have questions about whether your social security benefits are taxable, see IRS Pub. 915 or your 2023 federal income tax return instructions, or visit www.irs.gov/SSB.

Go to www.irs.gov/Forms to view, download, or print all of the forms and publications you may need.

Do not return this notice to the SSA or the IRS. Keep it with your records.

