

## **GO ONLINE FOR YOUR 1099**

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With tax season well on its way, millions of taxpayers are busy gathering all the forms and documents needed to file federal, state and local tax returns. It is important to remember that some people who receive Social Security may have to pay taxes on a portion of their benefits. For them, a Social Security Benefit Statement (Form SSA-1099) is an important tax document.

The SSA-1099s for tax year 2008 were all automatically mailed to beneficiaries by January 31, 2009. If you or someone you know who receives Social Security has not yet received a Form SSA-1099 for 2008, you can request a replacement online at [www.socialsecurity.gov](http://www.socialsecurity.gov).

The SSA-1099 shows the total amount of benefits received in the previous year and is used to find out if any benefits are subject to tax, and to complete a federal income tax return. Basically, the federal tax laws about Social Security benefits state that:

You will have to pay federal taxes on your benefits if you file a federal tax return as an "individual" and your total income is more than \$25,000. If you file a joint return, you will have to pay taxes if you and your spouse have a total income that is more than \$32,000.

Less than a third of current Social Security beneficiaries have incomes that exceed the thresholds, requiring them to pay taxes on a portion of their Social Security benefits. For more information, call the Internal Revenue Service (IRS) toll-free at 1-800-829-3676 and ask for IRS Publication Number 915, [Social Security and Equivalent Railroad Retirement Benefits](#). People who are deaf or hard of hearing may call the IRS toll-free number, 1-800-829-4059.

For more information about social Security, or to request a replacement SSA-1099, visit [www.socialsecurity.gov](http://www.socialsecurity.gov). Or you can call Social Security's toll-free number, 1-800-772-1213 (TTY1-800-325-0778) and ask for a replacement SSA-1099 over the phone.