

ATTENTION

*** REQUIRED DOCUMENTS FOR REAL ESTATE TAX RELIEF***

PLEASE SUBMIT THE FOLLOWING DOCUMENTS WITH YOUR
COMPLETED 2023 TAX RELIEF APPLICATION:

- All documents supporting your HOUSEHOLD income for 2022
Examples: W-2 from employer, 1099-DIV, 1099-INT, 1099-MISC,
1099-R, SSA-1099 from Social Security (Total Benefits Paid)
- Copy of your December 2022 bank statements supporting all checking
accounts, savings accounts, money markets, CDs, IRAs, etc.
- If applying with disability benefits, and you are a first-time applicant,
please send a copy of your award letter from Social Security.
- **FAILURE** to provide required documentation may result in
DISQUALIFICATION of tax relief.

**NOTE: PLEASE SUBMIT COPIES, AS ORIGINALS WILL
NOT BE RETURNED**

FORM SSA-1099 - SOCIAL SECURITY BENEFIT STATEMENT

2022

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

Box 1. Name		Box 2. Beneficiary's Social Security Number														
Box 3. Benefits paid in 2022 \$11,166.00	Box 4. Benefits Repaid to SSA in 2022 NONE	Box 5. New Benefits for 2022 (Box 3 minus Box 4) \$11,166.00														
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">DESCRIPTION OF AMOUNT IN BOX 3</th> <th style="border-bottom: 1px solid black;"></th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Paid by check or Direct Deposit</td> <td style="text-align: right; padding: 2px;">\$9,384.00</td> </tr> <tr> <td style="padding: 2px;">Medicare Part B premiums deducted from your benefits</td> <td style="text-align: right; padding: 2px;">\$1,782.00</td> </tr> <tr> <td style="padding: 2px;">Total Additions</td> <td style="text-align: right; padding: 2px;">\$11,166.00</td> </tr> <tr> <td style="padding: 2px;">Benefits for 2022</td> <td style="text-align: right; padding: 2px;">\$11,166.00</td> </tr> </tbody> </table>		DESCRIPTION OF AMOUNT IN BOX 3		Paid by check or Direct Deposit	\$9,384.00	Medicare Part B premiums deducted from your benefits	\$1,782.00	Total Additions	\$11,166.00	Benefits for 2022	\$11,166.00	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">DESCRIPTION OF AMOUNT IN BOX 4</th> <th style="border-bottom: 1px solid black;"></th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;"></td> <td style="text-align: center; padding: 2px;">NONE</td> </tr> </tbody> </table>	DESCRIPTION OF AMOUNT IN BOX 4			NONE
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DESCRIPTION OF AMOUNT IN BOX 4																
	NONE															
		Box 6. Voluntary Federal Income Tax Withheld NONE														
		Box 7. Address														
		Box 8. Claim Number (Use this number if you need to contact SSA.)														

The SSA-1099 is needed to verify **GROSS** income for **all** Social Security Retirement income or Disability income.

If you need a replacement form SSA-1099 you can go to the SSA website (<https://www.ssa.gov/myaccount>) and sign in or create an account and print a replacement form.

The Social Security Administration contact number is 1-800-772-1213
Monday through Friday 8:00am - 7:00pm.