FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2025
- 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
PATRICIA A REINSTEIN		018-34-7410
Box 3. Benefits Paid in 2025	**Box 4. Benefits Repaid to SSA in 2025**	**Box 5. Net Benefits for 2025** *(Box 3 minus Box 4)*
$19,872.00	NONE	$19,872.00

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or Direct deposit	$17,652.00
Medicare Part B premiums deducted from your benefits	$2,220.00
Total Additions	$19,872.00
Benefits for 2025	$19,872.00

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

NONE

Box 7. Address

PATRICIA A REINSTEIN
1409 BENEDICT CANYON
DR
BEVERLY HILLS CA 90210-2021

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

018-34-7410A

Form **SSA-1099-SM** (1-2026) **DO NOT RETURN THIS FORM TO SSA OR IRS** contact any Social Security office.

Notice 703

(Rev. November 2025)

IRS

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 2025, 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 2025. 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 **2025 Forms SSA-1099**. Include the full amount of any lump-sum benefit payments received in 2025, for 2025 and earlier years. . . . . **A.** ________

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

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. . . . . **C.** ________

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

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

Part of your social security benefits may be taxable if, for 2025, 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 2025).

If your figures show that part of your benefits may be taxable, see IRS Pub. 915 and *Social Security Benefits* in your 2025 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 2025, check the box on Form 1040 or 1040-SR, line 6d.

Note: If your figures show that part of your benefits may be taxable and you received benefits in 2025 that were for a prior year, see IRS Pub. 915, Social Security and Equivalent 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 2025 federal income tax return instructions.

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

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FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2025 • 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
FRED M REINSTEIN		487-44-2154
Box 3. Benefits Paid in 2025	**Box 4. Benefits Repaid to SSA in 2025**	**Box 5. Net Benefits for 2025** *(Box 3 minus Box 4)*
$39,959.00	$2,903.00	$37,056.00

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or Direct deposit	$37,739.00
Medicare Part B premiums deducted from your benefits	$2,220.00
Total Additions	$39,959.00
Benefits for 2025	$39,959.00

DESCRIPTION OF AMOUNT IN BOX 4

Checks returned to SSA	$2,903.00
Benefits Repaid to SSA in 2025	$2,903.00

Box 6. Voluntary Federal Income Tax Withheld

NONE

Box 7. Address

FRED M REINSTEIN
1409 BENEDICT CANYON
DR
BEVERLY HILLS CA 90210-2021

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

487-44-2154A

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