

Pensioner Tax Statement - Sample (Filled Out)

For reference purposes only

Personal Information

Full Name: John Edward Smith
Date of Birth: 1948-06-15
Social Security Number: 123-45-6789
Address: 789 Retirement Lane, Springfield, IL 62704

Section 1: Pension Income

Pension Plan Provider: Springfield Pension Fund
Account Number: PF-0034789
Gross Pension Received (USD): \$18,500.00

Section 2: Other Retirement Income (if any)

Social Security Benefits: \$13,900.00
Other Annuities/Retirement Plans: \$2,100.00

Section 3: Tax Withheld

Federal Tax Withheld: \$2,315.00
State Tax Withheld: \$591.00

Section 4: Deductions & Credits

Standard Deduction Claimed: \$15,700.00
Additional Credit(s): Senior Taxpayer Credit - \$1,500.00

Declaration

I hereby certify that the information provided above is accurate and complete to the best of my knowledge.

Signature: John E. Smith
Date: 2024-02-15