

# 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