

2018 Modification Worksheet

Taxable Social Security Income Worksheet

Name	Social security number

NOTE: Use this worksheet to determine the amount, if any, of your Social Security modification on Schedule M, line 1u.

MODIFICATION FOR TAXABLE SOCIAL SECURITY INCOME WORKSHEET

STEP 1: Eligibility

1 Enter your date of birth.....	1	
2 Enter your spouse's date of birth, if applicable.....	2	
3 Enter your Federal AGI from RI-1040 or RI-1040NR, line 1.....	3	
4 Enter your Filing Status.....	4	
5 Were either you or your spouse born on or before 01/01/1953? If yes, check the box to the right.	5	Yes <input type="checkbox"/>
6 Filing status amount. Enter the amount from below that corresponds to your filing status on line 4.....	6	

Single, head of household or married filing separately - \$83,550

Married filing jointly or qualifying widow(er) - \$104,450

7 Is your Federal AGI on line 3 less than the filing status amount on line 6? If yes, check the box to the right	7	Yes <input type="checkbox"/>
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If you answered yes to **both** questions 5 and 7, continue to Step 2.

Otherwise, **STOP**, you are not eligible for this modification.

STEP 2: Modification Amount

If you AND your spouse, if applicable, were born on or before 01/01/1953, enter 1.0000 on line 12 and skip lines 8 through 10.

8 Amount of social security benefits from Federal Form 1040, line 5a.....	8	
9 Amount of line 8 attributed to the person born on or before 01/01/1953.....	9	
10 Eligible percentage of social security benefits. Divide line 9 by line 8.....	10	_ . _ _ _ _
11 Taxable amount of social security from Federal Form 1040, line 5b.....	11	
12 Eligible percentage. Enter the percentage from line 10, or 1.0000, whichever applies.....	12	_ . _ _ _ _
13 Modification Amount. Multiply line 11 by line 12. Enter here and on Schedule M - page 1, line 1u.	13	