

**2017 Railroad Retirement Benefits**

	TS <sup>1</sup>	F <sup>2</sup>	ST <sup>3</sup>	City <sup>4</sup>						
<b>Recipient's name and address (if different from screen 1)</b>										
Claim number/Code		<sup>5</sup>								
Name: First, Last		<sup>6</sup>				<sup>7</sup>				
Street		<sup>8</sup>								
City		<sup>9</sup>								
State		ZIP								
U.S. only		<sup>10</sup>		<sup>11</sup>						
Foreign only		Province/State			Country		Postal code			
		<sup>12</sup>			<sup>13</sup>		<sup>14</sup>			
		<b>2016</b>		<b>2017</b>		<b>2016</b>		<b>2017</b>		
<b>RRB 2-12</b>	3 Employee contributions				<sup>15</sup>		8 Repayments			
	4 Contributory amount paid				<sup>16</sup>		9 Federal tax withheld			
	5 Vested dual benefit				<sup>17</sup>		10 Rate of tax			
	6 Supplemental annuity				<sup>18</sup>		11 Country			
	7 Total gross paid				<sup>19</sup>		12 Medicare premium total			
									<sup>20</sup>	
									<sup>21</sup>	
								<sup>22</sup>		
								<sup>23</sup>		
								<sup>24</sup>		
<p><b>Many states require date of retirement</b> <span style="float:right">Date of retirement <sup>25</sup></span></p> <p><b>AL, AR, KS, KY, LA, MI, &amp; UT may require this information.</b></p> <p>Portion of 1099-RRB to exclude on state <span style="float:right">Percent <sup>26</sup></span></p> <p>Portion of 1099-RRB NOT qualifying for state exclusion <span style="float:right">Amount <sup>27</sup></span></p> <p><b>Simplified Method Worksheet:</b></p> <p>2 Cost in plan at starting date plus any death benefit exclusion <span style="float:right"><sup>28</sup></span></p> <p>3 Age (or combined ages) at annuity starting date <span style="float:right"><sup>29</sup></span></p> <p style="padding-left: 20px;">If payments are for taxpayer's life and that of beneficiary</p> <p>4 WK_SGR Special Rule Computation <span style="float:right"><sup>30</sup></span></p> <p>5 Number of monthly payments during 2017 (12 is assumed) <span style="float:right"><sup>31</sup></span></p> <p>6 If starting date after 1986, enter amount recovered tax free <span style="float:right"><sup>32</sup></span></p> <p style="text-align:right"><b>2016</b> <span style="margin-left: 100px;"><b>2017</b></span></p> <p style="text-align:right"><sup>33</sup> <span style="margin-left: 100px;"><sup>34</sup></span></p> <p style="text-align:right"><sup>35</sup> <span style="margin-left: 100px;"><sup>36</sup></span></p>										
Annuity starting date:		<sup>36</sup> Before Nov 19, 1996		<sup>37</sup> After Nov 18, 1996						
<sup>38</sup> For disability income										
<sup>39</sup> If so, report as wages on line 7 of the 1040										

**Social Security Benefit Statement and Railroad Retirement Board Payment**

	TS <sup>1</sup>	F <sup>2</sup>	ST <sup>3</sup>									
		<b>2016</b>		<b>2017</b>								
<b>SSA 2-2</b>	5 Net benefits				<sup>4</sup>		5 Net benefits				<sup>4</sup>	
	Medicare premiums deducted				<sup>5</sup>		Medicare premiums deducted				<sup>5</sup>	
	Treat Medicare premiums as self-employed health insurance				<sup>6</sup>		Treat Medicare premiums as self-employed health insurance				<sup>6</sup>	
	Federal income tax withheld				<sup>7</sup>		Federal income tax withheld				<sup>7</sup>	
	Designate Social Security benefits as:				<sup>8</sup>		Designate Social Security benefits as:				<sup>8</sup>	