Schedule R (Form 1040A or 1040)

Department of the Treasury Internal Revenue Service (99)

Credit for the Elderly or the Disabled

▶ Complete and attach to Form 1040A or 1040.
 ▶ Information about Schedule R and its separate instructions is at www.irs.gov/form1040.



OMB No. 1545-0074

2012

Attachment
Sequence No. 16
Your social security number

You may be able to take this credit and reduce your tax if by the end of 2012:

• You were age 65 or older

Name(s) shown on Form 1040A or 1040

- or
- You were under age 65, you retired on **permanent and total** disability, and you received taxable disability income.

But you must also meet other tests. See instructions.

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In most cases, the IRS can figure the credit for you. See instructions.

Part I Check the Bo	ox for Your Filing Status and Age			
If your filing status is:	And by the end of 2012:	Check on	ly or	ne box:
Single, Head of household, or	1 You were 65 or older		1	
Qualifying widow(er)	2 You were under 65 and you retired on permanent and total disability		2	
	3 Both spouses were 65 or older		3	
	4 Both spouses were under 65, but only one spouse retired on permatotal disability		4	
Married filing jointly	5 Both spouses were under 65, and both retired on permanent disability		5	
	6 One spouse was 65 or older, and the other spouse was under 65 a on permanent and total disability		6	
	7 One spouse was 65 or older, and the other spouse was under 65 retired on permanent and total disability		7	
Married filing separately	8 You were 65 or older and you lived apart from your spouse for all of	2012 .	8	
	9 You were under 65, you retired on permanent and total disability lived apart from your spouse for all of 2012		9	
Did you check	— Yes — ➤ Skip Part II and complete Part III on the back.			
box 1, 3, 7, or 8?	— No — → Complete Parts II and III.			
Part II Statement of	Permanent and Total Disability (Complete only if you checked box 2, 4, 5, 6	or 9 above) .)	
	cian's statement for this disability for 1983 or an earlier year, or you rears after 1983 and your physician signed line B on the statement, and	filed or go	ot a	
2 Due to your contir in 2012, check this	nued disabled condition, you were unable to engage in any substantial box	•	ivity ►	
If you checked the state of the state o	his box, you do not have to get another statement for 2012.			
	eck this box, have your physician complete the statement in the instruction ent for your records.	ons. You m	ust	

10 If you checked (in Part I): Box 1, 2, 4, or 7	
Box 3, 5, or 6	
Box 8 or 9	
Did you check box 2, 4, 5, 6, or 9 in Part I? Yes You must complete line 11. Enter the amount from line 10 on line 12 and go to line 13.	
box 2, 4, 5, 6, or 9 in Part I? No No Enter the amount from line 10 on line 12 and go to line 13	
or 9 in Part I? No Enter the amount from line 10 on line 12 and go to line 13	
on line 12 and go to line 13	
11 If you checked (in Part I):	
Box 6, add \$5,000 to the taxable disability income of the	
spouse who was under age 65. Enter the total.	
Box 2, 4, or 9, enter your taxable disability income.	
Box 5, add your taxable disability income to your spouse's taxable disability income. Enter the total.	
taxable disability income. Lines the total.	
For more details on what to include on line 11, see Figure Your Credit in the instructions.	
12 If you completed line 11, enter the smaller of line 10 or line 11. All others, enter the	
amount from line 10	
13 Enter the following pensions, annuities, or disability income that	
you (and your spouse if filing jointly) received in 2012.	
a Nontaxable part of social security benefits and nontaxable part of railroad retirement benefits treated as social security (see	
instructions)	
b Nontaxable veterans' pensions and any other pension, annuity,	
or disability benefit that is excluded from income under any	
other provision of law (see instructions)	
c Add lines 13a and 13b. (Even though these income items are	
not taxable, they must be included here to figure your credit.) If you did not receive any of the types of nontaxable income listed	
on line 13a or 13b, enter -0- on line 13c	
14 Enter the amount from Form 1040A, line	
22, or Form 1040, line 38 14	
15 If you checked (in Part I): Enter:	
Box 1 or 2 \$7,500	
Box 3, 4, 5, 6, or 7 \$10,000 } 15 Box 8 or 9 \$5,000	
16 Subtract line 15 from line 14. If zero or	
less, enter -0	
17 Enter one-half of line 16	
18 Add lines 13c and 17	
19 Subtract line 18 from line 12. If zero or less, stop ; you cannot take the credit. Otherwise,	
go to line 20	
 Multiply line 19 by 15% (.15)	
22 Credit for the elderly or the disabled. Enter the smaller of line 20 or line 21. Also enter	
this amount on Form 1040A, line 30, or include on Form 1040, line 53 (check box c and	
enter "Sch R" on the line next to that box)	