## 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



Name(s) shown on Form 1040A or 1040

www.irs.gov/form1040.

Sequence No. 16

Your social security number

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

•	You	were	age	65	or	older
---	-----	------	-----	----	----	-------

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.

	•
_	•
_	7
TIE	. 1
	- 1
	4

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

	ox for Your Filing Status and Age			
If your filing status is:	And by the end of 2012:	Check on	ıly o	ne box:
Single, Head of household, or	<b>1</b> You were 65 or older		1	
Qualifying widow(er)	2 You were under 65 and you retired on permanent and total disability	,	2	
	<b>3</b> Both spouses were 65 or older		3	
	4 Both spouses were under 65, but only one spouse retired on perm total disability		4	
Married filing jointly	<b>5</b> Both spouses were under 65, and both retired on permanent disability	and total	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 6 retired on permanent and total disability		7	
Married filing	8 You were 65 or older and you lived apart from your spouse for all of	2012 .	8	
separately	<b>9</b> 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,		∍.)	
	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, <b>and</b>	filed or go	ot a	
2 Due to your continuin 2012, check this	nued disabled condition, you were unable to engage in any substantial box	•	ivity ►	
<ul> <li>If you checked t</li> </ul>	his box, you do not have to get another statement for 2012.			
	eck this box, have your physician complete the statement in the instructient for your records.	ons. You <b>m</b>	ıust	

Part	Figure Your Credit		<del>.</del>	
10	If you checked (in Part I): Enter:			
	Box 1, 2, 4, or 7			
	Box 3, 5, or 6	10		
	Box 8 or 9			
	Did you check Yes You must complete line 11.			
	DOX 2, 4, 5, 6,			
	or 9 in Part I? Enter the amount from line 10			
11	If you checked (in Part I):  on line 12 and go to line 13.			
	• 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.	11		
	Box 5, add your taxable disability income to your spouse's			
	taxable disability income. Enter the total.			
	For many dataile an substitution led on line 11 and Figure Value Credit in the instructions			
TIP	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 <b>smaller</b> of line 10 or line 11. <b>All others,</b> enter the			
12	amount from line 10	12		
13	Enter the following pensions, annuities, or disability income that			
	you (and your spouse if filing jointly) received in 2012.			
а	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)			
_	Add lines 13a and 13b. (Even though these income items are			
U	not taxable, they <b>must</b> 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			
4-	22, or Form 1040, line 38			
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	18		
19	Subtract line 18 from line 12. If zero or less, <b>stop</b> ; you <b>cannot</b> take the credit. Otherwise,	10		
00	go to line 20	19 20		
20	Multiply line 19 by 15% (.15)	21		
21 22	Credit for the elderly or the disabled. Enter the smaller of line 20 or line 21. Also enter	<b>4</b> 1		
22	this amount on Form 1040A, line 30, or include on Form 1040, line 53 (check box <b>c</b> and			
	enter "Sch R" on the line next to that box)	22		