

1999 INDIVIDUAL INCOME TAX WORKSHEETS

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Worksheet VIII - Taxable Social Security

The portion of your social security benefits taxable to Montana may be different than what is taxable to federal.

NOTE: None of your benefits are taxable to Montana if:

- A. The only retirement you receive is Railroad Retirement income, or
B. Your federal adjusted gross income plus all exempt income is less than:
1) \$32,000 if you are filing a joint return;
2) \$25,000 if you file a single/head of household return
3) \$16,000 if you are filing married filing separate on the same form.

If you fall into one of the above categories, enter any benefits taxable to federal on line 34 of Form 2. Do not fill out this form.

Form with columns for Filing Status (Single, Married filing joint return, Married and both filing separate returns on this form, Married and both filing separate returns on separate forms, Married filing separate return and spouse is not filing, Head of Household) and rows for Federal adjusted gross income, Subtractions (social security, capital gain, exempt retirement), Additions (interest, refund), Modified adjusted gross income, and final taxable amount calculations.

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