

## FREQUENT TAX QUESTIONS

### When is Social Security taxable?

- If you are single and half of your social security plus your other income exceeds \$25,000, if more than \$34,000, 85% will be taxable.
- If you are married and half of your and you spouse's social security plus your other income exceeds \$32,000, if more than \$44,000, 85% will be taxable.

### What is My Minimum Gross Income Filing Requirement?

Single under age 65-----	\$12,400
Single age 65 or older-----	\$14,050
Married filing jointly, both spouses under 65-----	\$24,800
Married filing jointly, 1 spouse age 65 or older---	\$26,100
Married filing jointly, both 65 or older-----	\$27,400
Married filing separately, any age-----	\$5
Head of household under age 65-----	\$18,650
Head of household age 65 or older-----	\$20,300
Qualifying widow(er) under age 65-----	\$24,800
Qualifying widow(er) age 65 or older-----	\$26,100

### If I Am Claimed as a Dependent, Do I Still Need to File?

You must file if any of the following apply:

- Your unearned income was more than \$1,100.
- Your earned income was more than \$12,400.
- Your gross income was more than \$1,100, or \$350 plus your earned income up to \$11,850, whichever is greater.

### Unusual Tax Filing Situations

You must file if any of these apply:

- You owe a penalty on an early retirement withdrawal
- Your earned tips not reported to your employer.
- Your self-employment income was \$400 or more
- Your wages from a church were 108.28 and the church is exempt from employer SS or Medicare taxes.
- You were enrolled in Obamacare and received premium assistance (Form 1095-A)

## Should I File If I Am Not Required to File?

You may want to file if:

- You want to receive a stimulus payment
- Your employer withheld federal or state income tax
- You are entitled to an Earned Income Credit, Child Tax Credit, or the American Opportunity Tax Credit