

Schedule R (Form 1040)

Credit for the Elderly or the Disabled

OMB No. 1545-0074

2021

Department of the Treasury Internal Revenue Service (99)

Attach to Form 1040 or 1040-SR. Go to www.irs.gov/ScheduleR for instructions and the latest information.

Attachment Sequence No. 16

Name(s) shown on return

Your social security number

You may be able to take this credit and reduce your tax if by the end of 2021:

- 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.

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

Part I Check the Box for Your Filing Status and Age

If your filing status is: And by the end of 2021: Check only one box:

- Single, Head of household, or Qualifying widow(er) 1 You were 65 or older 1
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 permanent and total disability 4
5 Both spouses were under 65, and both retired on permanent and total disability 5
6 One spouse was 65 or older, and the other spouse was under 65 and retired on permanent and total disability 6
7 One spouse was 65 or older, and the other spouse was under 65 and not retired on permanent and total disability 7
8 You were 65 or older and you lived apart from your spouse for all of 2021 8
9 You were under 65, you retired on permanent and total disability, and you lived apart from your spouse for all of 2021 9

Did you check box 1, 3, 7, or 8? Yes Skip Part II and complete Part III on page 2. 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.)

- If: 1 You filed a physician's statement for this disability for 1983 or an earlier year, or you filed or got a statement for tax years after 1983 and your physician signed line B on the statement, and
2 Due to your continued disabled condition, you were unable to engage in any substantial gainful activity in 2021, check this box
If you checked this box, you don't have to get another statement for 2021.
If you didn't check this box, have your physician complete the statement in the instructions. You must keep the statement for your records.