



## MISSOURI SENATE

JEFFERSON CITY

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### **Sen. Kevin Engler Advises Seniors of Social Security Income Tax Exemption Passed Last Year**

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JEFFERSON CITY –Sen. Kevin Engler, R-Farmington, is encouraging seniors to utilize the income tax exemption available for Social Security benefits while they are filing their taxes in the coming weeks. The phased-in exemption was passed in House Bill 444 during the 2007 legislative session.

“Seniors spent their entire careers paying into the Social Security system,” said Sen. Engler. “It was simply not fair for the state to tax those benefits a second time.”

The phase-in begins with the 2007 tax year at 20 percent and will eventually become a complete 100 percent exemption by the 2012 tax year. Seniors ages 62 or over and all disabled residents will be eligible for the exemptions. An income threshold of \$85,000 for an individual or \$100,000 for a couple applies. Some public retirements are also included in the exemption, qualifying public retirement benefits include those from plans for firefighters, police officers, railroad workers, teachers, as well as veterans and certain federal employees. These pensions will also be exempt from state taxes up to the maximum Social Security benefit by 2012.

In order to receive the exemption, those who qualify must include additional information with their 2007 tax filing. Detailed instructions and forms are available at the Department of Revenue website at <http://dor.mo.gov/tax/personal/ptc/pension.htm> or by calling 314-877-0177.

“This exemption helps seniors keep the benefits they deserve and depend on,” said Sen. Engler. “I want to make sure Missourians know about this exemption and utilize it when filing their taxes.”

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