

**Schedule R
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Credit for the Elderly or the Disabled

▶ **Attach to Form 1040.** ▶ **See separate instructions for Schedule R.**

OMB No. 1545-0074

1998

Attachment
Sequence No. **16**

Name(s) shown on Form 1040

Your social security number

You may be able to take this credit and reduce your tax if by the end of 1998:

- 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 the separate instructions for Schedule R.

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

Part I Check the Box for Your Filing Status and Age

If your filing status is: **And by the end of 1998:** **Check only one box:**

Single,
Head of household, or
Qualifying widow(er)
with dependent child

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**

Married filing a
joint return

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**

Married filing a
separate return

8 You were 65 or older and you lived apart from your spouse for all of
1998 **8**

9 You were under 65, you retired on permanent and total disability, and
you lived apart from your spouse for all of 1998 **9**

Did you check box 1, 3, 7, or 8?	Yes →	Skip Part II and complete Part III on back.
	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 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 1998, check this box
- If you checked this box, you do not have to get another statement for 1998.
 - If you **did not** check this box, have your physician complete the statement on page 4 of the instructions. You **must** keep the statement for your records.

