

PA-40 - 2021
Pennsylvania Income Tax Return
ENTER ONE LETTER OR NUMBER IN EACH BOX (06-21)

849426230

PENUMETCHA

DINESH VARMA

Occupation SOFTWARE E

Occupation

APT 301

675 CORNELL CT

HARRISBURG

PA 17111

937-409-9046

22275

N Extension. N Amended Return.

R Residency Status.
PA Resident/Nonresident/Part-Year Resident
from to

S Single, Married/Filing Jointly,
Married/Filing Separately, Final Return

N Deceased

N Taxpayer Date of Death

N Spouse Date of Death

N Farmers.

School District Name HARRISBURG CI

- 1a Gross Compensation. Do not include exempt income, such as combat zone pay and qualifying retirement benefits. See the instructions.
1b Unreimbursed Employee Business Expenses.
1c Net Compensation. Subtract Line 1b from Line 1a.
2 Interest Income. Complete PA Schedule A if required.
3 Dividend and Capital Gains Distributions Income. Complete PA Schedule B if required.
4 Net Income or Loss from the Operation of a Business, Profession or Farm.
5 Net Gain or Loss from the Sale, Exchange or Disposition of Property.
6 Net Income or Loss from Rents, Royalties, Patents or Copyrights.
7 Estate or Trust Income. Complete and submit PA Schedule J.
8 Gambling and Lottery Winnings. Complete and submit PA Schedule T.
9 Total PA Taxable Income. Add only the positive income amounts from Lines 1c, 2, 3, 4, 5, 6, 7 and 8. DO NOT ADD any losses reported on Lines 4, 5 or 6.
10 Other Deductions. Enter the appropriate code for the type of deduction. See the instructions for additional information.
11 Adjusted PA Taxable Income. Subtract Line 10 from Line 9.

Table with 2 columns: Line Number and Amount. Rows include 1a (156000), 1b (0), 1c (156000), 2 (0), 3 (161), 4 (0), 5 (165533), 6 (0), 7 (0), 8 (0), 9 (321694), 10 (0), 11 (321694).



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[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

PA-40 - 2021

Social Security Number

849426230 Name(s) DINESH VARMA PENUMETCHA

- 12 PA Tax Liability. Multiply Line 11 by 3.07 percent (0.0307).
- 13 Total PA Tax Withheld. See the instructions.
  
- 14 Credit from your 2020 PA Income Tax return.
- 15 2021 Estimated Installment Payments. REV-459B included. N
- 16 2021 Extension Payment.
- 17 Nonresident Tax Withheld from your PA Schedule(s) NRK-1. (Nonresidents only)
- 18 Total Estimated Payments and Credits. Add Lines 14, 15, 16 and 17.
  
- Tax Forgiveness Credit. Submit PA Schedule SP.**
- 19a Filing Status: 01 Unmarried or Separated 02 Married 03 Deceased
- 19b Dependents, Section II, Line 2, PA Schedule SP
- 20 Total Eligibility Income from Section III, Line 11, PA Schedule SP.
- 21 Tax Forgiveness Credit from Section IV, Line 16, PA Schedule SP.
  
- 22 Resident Credit. Submit your PA Schedule(s) G-L and/or RK-1.
- 23 Total Other Credits. Submit your PA Schedule OC.
- 24 TOTAL PAYMENTS and CREDITS. Add Lines 13, 18, 21, 22 and 23.
- 25 USE TAX. Due on internet, mail order or out-of-state purchases. See instructions.
- 26 TAX DUE. If the total of Line 12 and Line 25 is more than line 24, enter the difference here.
- 27 Penalties and Interest. See the instructions. Enter Code: E  
If including form REV-1630/REV-1630A, mark the box. Y
  
- 28 TOTAL PAYMENT DUE. See the instructions.
- 29 OVERPAYMENT. If Line 24 is more than the total of Line 12, Line 25 and Line 27, enter the difference here.  
The total of Lines 30 through 36 must equal Line 29.
- 30 Refund - Amount of Line 29 you want as a check mailed to you. REFUND
- 31 Credit - Amount of Line 29 you want as a credit to your 2022 estimated account.
  
- 32 Refund donation line. Enter the organization code and donation amount. See instructions.
- 33 Refund donation line. Enter the organization code and donation amount. See instructions.
- 34 Refund donation line. Enter the organization code and donation amount. See instructions.
- 35 Refund donation line. Enter the organization code and donation amount. See instructions.
- 36 Refund donation line. Enter the organization code and donation amount. See instructions.

12		9876
13		4789
14		0
15		0
16		0
17		0
18		0
19a	00	
19b	00	
20		0
21		0
22		0
23		0
24		4789
25		0
26		5087
27		83
28		5170
29		0
30		0
31		0
32		
33		
34		
35		
36		

Signature(s). Under penalties of perjury, I (we) declare that I (we) have examined this return, including all accompanying schedules and statements, and to the best of my (our) belief, they are true, correct, and complete.

Your Signature	Spouse's Signature, if filing jointly
Preparer's Name and Telephone Number SYAM PRIYA RAM SAGAR GUPTA TALLAM 6789659522	Date 033122

E-File Opt Out N

Firm FEIN 301017196

Preparer's PTIN P02082703



**PA SCHEDULE B**  
Dividend Income

2101510028

PA-40 B (EX) 06-21 (I)  
PA Department of Revenue

**2021**

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Name shown first on the PA-40 (if filing jointly) DINESH VARMA PENUMETCHA	Social Security Number (shown first) 849-42-6230
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**CAUTION:** Federal and PA rules for dividend income are different. **Read the instructions.**

If your total PA-taxable dividend and capital gains distributions income (taxpayer, spouse and/or joint) is equal to the amount reported on your federal return and does not include any amounts for Lines 2 through 11 (not including subtotal Line 6) of PA Schedule B, you must report your income on Line 3 of the PA-40, but you do not have to submit PA Schedule B. If there are any amounts (taxpayer, spouse and/or joint) for any of the Lines 2 through 11 (not including subtotal Line 6), you must complete and submit PA Schedule B with your PA-40. A taxpayer and spouse must complete separate schedules to report their income if any amounts are reported on Lines 2 through 11 (not including subtotal Line 6) of Schedule B. However, if all the income is earned on a joint basis, one schedule may be completed. Complete the oval to indicate whether the income included on the schedule is from the taxpayer, spouse or joint. If a separate PA Schedule B is prepared for a taxpayer and spouse, include only the taxpayer or spouse share of the income for each line.

**PA SCHEDULE B - PA-Taxable Dividend and  
Capital Gains Distributions Income** (See the instructions.)

Taxpayer  Spouse  Joint

1. Dividend income from Line 3b of your federal return. <b>See instructions.</b>	1.	\$	132
2. Dividend income from federal Schedule K-1(s). <b>See instructions.</b>	2.	\$	
3. Pennsylvania exempt-interest dividend income. <b>See instructions.</b>	3.	\$	
4. Other reduction adjustments. <b>See instructions.</b> Description: _____	4.	\$	
5. Add the amounts on Lines 2, 3 and 4.	5.	\$	
6. Subtract Line 5 from Line 1.	6.	\$	132
7. Total exempt-interest dividends. <b>See instructions.</b>	7.	\$	
8. Other addition adjustments. <b>See instructions.</b> Description: _____	8.	\$	
9. Repatriation of foreign income. <b>See instructions.</b>			
a. Total earnings and profits included on Line 1 of IRC Section 965 Transition Tax Statement.      9a. _____			
b. Total payments of earnings and profits included in Line 9a received in prior years.            9b. _____			
c. Payments of earnings and profits included in Line 9a received in current year.   9c.		\$	
10. Capital Gains Distributions - <b>See instructions.</b>	10.	\$	29
11. Dividend income from PA S corporation(s) and partnerships, reported on your PA Schedule(s) RK-1 or federal Schedule(s) K-1.	11.	\$	
<b>12. Total PA-Taxable Dividend Income.</b> Add Lines 6, 7, 8, 9c, 10 and 11. Enter on Line 3 of your PA-40.	12.	\$	161

1555  
REV 03/22/22 PRO



2101510028

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**PA SCHEDULE D**  
Sale, Exchange or Disposition of Property

2101310023

PA-40 D (EX) 06-21 (I)  
PA Department of Revenue

**2021**

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If you need more space, you may photocopy.

Name of the taxpayer filing this schedule <b>DINESH VARMA PENUMETCHA</b>	Social Security Number (shown first) <b>849-42-6230</b>
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Taxpayer  Spouse  Joint

**Important:** A taxpayer and spouse must complete separate schedules to report their gains or losses or if any amounts are reported on Lines 3 through 10 of PA Schedule D. However, if all the gains and losses were realized on a joint basis, one schedule may be completed. Complete the oval to indicate whether the gains and losses included on the schedule are from the taxpayer, spouse or joint. One spouse may not use a loss to reduce the other spouse's gains. When reporting the sale of jointly owned property that is not reported on a joint PA Schedule D, each must show their share of the sale on their separate PA Schedule D. **Read the instructions.** Enter all sales, exchanges or other dispositions of real or personal tangible and intangible property, including inherited property. Amounts from Federal Schedule D may not be correct for PA income tax purposes. Nonresidents should read carefully the instructions concerning intangible property. If the result is a loss, fill in the oval next to the line.

(a) Describe the property: 100 shares of XYZ stock, or 10 acres in Dauphin County	(b) Date acquired: Month/day/year	(c) Date sold: Month/day/year	(d) Gross sales price less expenses of sale	(e) Cost or adjusted basis of the property sold	(f) Gain or loss: (d) minus (e) (If a loss, fill in the oval).
1. ROBINHOOD SECURITIES	01/01/21	12/31/21	95,688.	101,202.	<input checked="" type="checkbox"/> LOSS 5,514.
INTERACTIVE BROKERS	01/01/21	12/31/21	322,619.	317,328.	<input type="checkbox"/> LOSS 5,291.
AMERITRADE	01/01/21	12/31/21	6,040.	10,012.	<input checked="" type="checkbox"/> LOSS 3,972.
VANGUARD	01/01/21	12/31/21	54,560.	30,422.	<input type="checkbox"/> LOSS 24,138.
BAL-USD	01/01/21	12/31/21	3,198.	4,992.	<input checked="" type="checkbox"/> LOSS 1,794.
BNT-USD	01/01/21	12/31/21	4,028.	3,653.	<input type="checkbox"/> LOSS 375.
CRV-USD	01/01/21	12/31/21	9,938.	9,432.	<input type="checkbox"/> LOSS 506.
EOS-USD	01/01/21	12/31/21	7,807.	5,640.	<input type="checkbox"/> LOSS 2,167.
LTC-USD	01/01/21	12/31/21	7,153.	6,865.	<input type="checkbox"/> LOSS 288.
ALGO-USD	01/01/21	12/31/21	334.	161.	<input type="checkbox"/> LOSS 173.
BTC-USD	01/01/21	12/31/21	4,311.	4,441.	<input checked="" type="checkbox"/> LOSS 130.
MATIC-USD	01/01/21	12/31/21	11,312.	3,920.	<input type="checkbox"/> LOSS 7,392.
USDTZUSD	01/01/21	12/31/21	10,695.	10,699.	<input checked="" type="checkbox"/> LOSS 4.
XLTCZUSD	01/01/21	12/31/21	2,886.	2,495.	<input type="checkbox"/> LOSS 391.
XTZUSD	01/01/21	12/31/21	1,762.	991.	<input type="checkbox"/> LOSS 771.
ADABTC	01/01/21	12/31/21	46,585.	2,802.	<input type="checkbox"/> LOSS 43,783.
ROBINHOOD SECURITIES	01/01/21	12/31/21	260.	211.	<input type="checkbox"/> LOSS 49.
VANGUARD	01/01/20	12/31/21	8,863.	7,371.	<input type="checkbox"/> LOSS 1,492.
See Disposition of Property			96,722.	6,591.	<input type="checkbox"/> LOSS
2. Net gain (loss) from above sales. . . . .				<input type="checkbox"/> LOSS	2. 165,533.
3. Gain from installment sales from PA Schedule D-1. . . . .					3.
4. Taxable distributions from C corporations. . . . . Enter total distribution					
. . . . . Minus adjusted basis					= 4.
5. Net gain (loss) from the sale of 6-1-71 property from PA Schedule D-71. . . . .				<input type="checkbox"/> LOSS	5.
6. Net PA S corporation and partnership gain (loss) from your PA Schedule(s) RK-1 or NRK-1 . . . . .				<input type="checkbox"/> LOSS	6.

**Taxable gain from selling a principal residence.** Complete and submit PA Schedule 19. Complete Columns (a) through (e) and enter your total gain on Line 7.

(a) Address of residence	(b) Date acquired: Month/day/year	(c) Date sold: Month/day/year	(d) Gross sales price less expenses of sale	(e) Cost or adjusted basis of the property sold	(f) Gain or loss: (d) minus (e)
7. Taxable gain from the sale of your principal residence. If you realized a loss on the sale of your principal residence, enter a zero. If you realized a gain/loss on the sale of the nonresidential portion of your principal residence, enter the information on Line 1 . . . . .					7.
8. Taxable distributions from partnerships from REV-999. . . . .					8.
9. Taxable distributions from PA S corporations from REV-998. . . . .					9.
10. Taxable gain from exchange of insurance contracts. . . . .					10.
11. Total PA Taxable Gain (Loss). Add Lines 2 through 10. Enter on Line 5 of your PA-40. (If a net loss, fill in the oval). . . . .				<input type="checkbox"/> LOSS	11. 165,533.

1555  
REV 03/22/22 PRO



2101310023

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**REV-1630 - 2021**  
**Underpayment of Estimated Tax**  
**By Individuals (01-22)**  
**PA Department of Revenue**

DINESH VARMA PENUMETCHA

849426230

**BEFORE YOU BEGIN:** Did you qualify for 100 percent tax forgiveness in 2020? If yes, stop here. You do not owe an estimated underpayment penalty and are not required to complete this form or include it with your return. If no, continue to see if you qualify for any of the exceptions.

**SECTION I – CALCULATING THE UNDERPAYMENT**

1a. 2021 Tax Liability from Line 12 of Form PA-40.	9876
1b. Multiply the amount on Line 1a by 0.90.	8888
2. Add the amounts reported on Lines 13, 17, 21, 22 and 23 of Form PA-40.	4789
3. Subtract Line 2 from Line 1a. If result is less than \$246, stop here.	5087
4. Subtract Line 2 from Line 1b.	4099

**ESTIMATED PAYMENT DUE DATES - Fiscal filers see instructions.**

	a April 15, 2021	b June 15, 2021	c Sept. 15, 2021	d Jan. 18, 2022
5. Divide Line 4 by the number of payments required for the year (usually four). Enter the result in the appropriate columns.	1024	1025	1025	1025
6. Estimated tax paid including carryover credit from previous tax year. See instructions.	0	0	0	0
7. Overpayment (from Line 10) from a previous period. See instructions	0	0	0	0
8. Add Lines 6 and 7.	0	0	0	0
9. Underpayment. Subtract Line 8 from Line 5. If Columns a through d are all zero, stop here. No penalty is due.	1024	1025	1025	1025
10. Overpayment. Subtract Line 5 from Line 8. If Columns a through d all show an overpayment, stop here. No penalty is due.	0	0	0	0

**SECTION II – EXCEPTIONS TO INTEREST**

You will not have to pay interest on the underpayment if the tax payments you made as shown in Section II, Line 11 were paid on time and the amount shown on Section II, Line 11 is equal to or more than the amount in Section II, Line 12 or Line 13, for the same payment period. This exception does not apply if you did not file a return for the prior year or if the prior year's return was filed as a part-year resident.

**EXCEPTION 1 WORKSHEET – Section II, Line 11 Calculation**

	a April 15, 2021	b June 15, 2021	c Sept. 15, 2021	d Jan. 18, 2022
A. Divide the amount reported in Section I, Line 2 by 4. Enter the amount in each of the four columns.	0	0	0	0
B. Enter the estimated payments reported in Section I, Line 6. Enter the payments under the installment period in which they were paid.	0	0	0	0
C. Add Lines A and B under each column.	0	0	0	0
11. Enter the amounts listed on Exception 1 Worksheet, Line C. For Column a this is the amount from Line C above. For Column b add the amounts of Columns a and b from Line C; for Column c add the amounts from Columns a, b and c; and for Column d add the amounts from Columns a, b, c and d.	0	0	0	0
12. <b>Exception 1</b> – Tax on 2020 income using 2021 tax rate. See instructions.	0	0	0	0

If the amount on Line 11 is equal to or greater than Line 12, you do not owe penalty for that quarter and you should place an X in the applicable box on Line 14a or 14b for that quarter.



**REV-1630 - 2021**  
**Underpayment of Estimated Tax**  
**By Individuals (01-22)**  
**PA Department of Revenue**

**SECTION II – EXCEPTIONS TO INTEREST cont.**

**EXCEPTION 2 WORKSHEET** – Use this worksheet if your income was earned unevenly throughout 2021 and your 2021 estimated tax payments, tax withholdings and credits equal at least 90 percent of the tax on your taxable income for the periods.

**EXCEPTION 2 WORKSHEET – Section II, Line 13 Calculation**

	01/01/21 - 03/31/21	01/01/21 - 05/31/21	01/01/21 - 08/31/21	01/01/21 - 12/31/21
A. Enter your actual taxable income for the period.	0	0	0	0
B. Multiply Line A by 3.07 percent (0.0307). This is the tax due.	0	0	0	0
13. Exception 2 - Tax on 2021 income over three, five, eight and 12 month periods. Enter 90 percent of Exception 2 Line B.	0	0	0	0

If the amount on Line 11 is equal to or greater than Line 13, you do not owe penalty for that payment period and you should place an X in the applicable box on Line 14a or 14b for that quarter.

**SECTION III – CALCULATING INTEREST**

**COMPLETE LINES 15 THROUGH 16 IF NONE OF THE EXCEPTIONS APPLY. DO NOT USE FEDERAL CALCULATIONS.**

9. Enter the amounts from Section I, Line 9.	1024	1025	1025	1025
14a. Number of days after due date of estimated payment to and including date of annual payment or Dec. 31, 2021, whichever is earlier. If Dec. 31 is earlier, enter 260, 199 and 107 respectively.	260	199	107	
14b. Number of days after due date of estimated payment to and including date of annual payment or April 15, 2022, whichever is earlier. If April 15 is earlier, enter 90.				90
14c. Number of days after Dec. 31, 2021 to and including date of annual payment or April 15, 2022, whichever is earlier. If April 15 is earlier, enter 105 in each column.	108	108	108	
15a. Number of days on Line 14a times 0.000082 times underpayment on Line 9.	22	17	9	
15b. Number of days on Line 14b times 0.000082 times underpayment on Line 9.				8
15c. Number of days on Line 14c times 0.000082 times underpayment on Line 9.	9	9	9	
16. Interest. Add amounts on Lines 15a, b and c. Include on Line 27 of Form PA-40.				83

**SPECIAL EXCEPTION INFORMATION**

Please enter the following information to verify the correct application of the special exceptions rule:

A. Enter the amount of your 2020 PA Tax Liability (Line 12 from your 2020 PA-40 tax return), less the amounts from Lines 13, 17, 22 and 23 from your 2020 PA-40 tax return. 0

B. Did you make estimated payments beginning in the period in which it became known that your income not subject to tax exceeded \$8,000? N

If the amount for Line A is \$246 or greater, or if you answer "No" to Line B, you do not qualify for the special exception. To be eligible for the special exception, you must also make estimated payments beginning in the period in which it becomes known that income not subject to withholding will exceed \$8,000. See the instructions for "DETERMINING THE UNDERPAYMENT AMOUNT ON WHICH THE ADDITION OF INTEREST MAY BE ASSESSED" on Page 4 for additional information.

**Filing Tips**

The department calculates the following using two decimal places:

- Line 1b and Lines 4 through 10 of Section I;
- Lines A, B, C and 11 of Exception 1 of Section II;
- Line 13 of Exception 2 of Section II; and
- Lines 14a through 16 of Section III

Rounding to whole dollars is utilized only on the following:

- Lines 1a, 2 and 3 of Section I;
- Line 12 of Exception 1 of Section II; and
- Lines A and B of Exception 2 of Section III.

FOR ADDITIONAL INFORMATION, PLEASE SEE THE "EXAMPLE OF INTEREST CALCULATION" ON THE LAST PAGE OF THE INSTRUCTIONS





PENNSYLVANIA E-FILE SIGNATURE AUTHORIZATION

PA-8879 (EX) 10-21

2021

Declaration Control Number/Submission ID

Table with 2 columns: Taxpayer Name and Social Security Number. Includes Primary and Secondary Taxpayer information.

SECTION I TAX RETURN INFORMATION – TAX YEAR ENDING DEC. 31, 2021 (whole dollars only)

Table with 2 columns: Line Item Description and Amount. Includes Adjusted PA taxable income, PA tax liability, Total PA tax withheld, Amount to be refunded, and Total payment.

SECTION II DECLARATION AND SIGNATURE AUTHORIZATION OF TAXPAYER

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements of my 2021 PA Tax Return (Form PA-40), and to the best of my knowledge and belief, it is true, correct and complete.

PRIMARY TAXPAYER'S PERSONAL IDENTIFICATION NUMBER (PIN) Mark one oval only.
[X] I authorize GLOBAL TAXES LLC to enter my PIN 26230 as my signature on my tax year 2021 electronically filed income tax return.

Signature \_\_\_\_\_ Date \_\_\_\_\_

SECONDARY TAXPAYER'S PIN Mark one oval only.
[] I authorize \_\_\_\_\_ to enter my PIN \_\_\_\_\_ as my signature on my tax year 2021 electronically filed income tax return.

Signature \_\_\_\_\_ Date \_\_\_\_\_

SECTION III CERTIFICATION AND AUTHENTICATION – PRACTITIONER PIN PROGRAM PARTICIPANTS ONLY

ERO'S EFIN/PIN Enter your six-digit EFIN followed by your five-digit self-selected PIN 587278 / 61989

As a participant in the Practitioner PIN Program, I certify the above numeric entry is my PIN, which is my signature on the tax year 2021 electronically filed income tax return for the taxpayer(s) indicated above.

ERO's Signature \_\_\_\_\_ Date \_\_\_\_\_

The ERO must retain this form and supporting documents for three years. DO NOT SUBMIT THIS FORM TO THE PA DEPARTMENT OF REVENUE UNLESS REQUESTED TO DO SO.

Name DINESH VARMA PENUMETCHA	Social Security Number 849-42-6230
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**Federal Forms W-2**

# of W2	* N T / T X B L	TS	N R H	Employer Name  Employer identification number from box B	Federal wages from box 1  Medicare wages from box 5	Pennsylvania (state) compensation from box 16 (See Tax Help) Pennsylvania (state) income tax withheld from box 17	ST ID
1		T		TEJ SOLUTIONS INC 74-3112275	156,000. 156,000.	156,000. 4,789.	PA

	Taxpayer	Spouse
Pennsylvania W-2 . . . . .	156,000.	0.
Pennsylvania W-2 to Schedule NRH, line 9 . . . . .		
Federal Form 4137, Unreported Tips, line 6 . . . . .		
Non-Pennsylvania W-2 to Schedule SP, line 6 . . . . .		
Withholding . . . . .	4,789.	

**Federal Forms W-2: Local Tax**

# of W2	* N T / T X B L	TS	Employer identification number from box B	Locality name	Local wages, tips, etc. (local) from box 18	Local income tax (local) from box 19	ST ID
1		T	74-3112275	PA 220106	156,000.	3,120.	PA

	Taxpayer	Spouse
Pennsylvania Local W-2 . . . . .	156,000.	
Federal Form 4137, Unreported Tips, line 6 . . . . .		
Withholding . . . . .	3,120.	

**Excess Reimbursements**

*	Description	Employer's EIN	T/S	Amount

	Taxpayer	Spouse
Excess Reimbursements . . . . .		



**Miscellaneous Compensation from Federal Forms 1099MISC, 1099K, 1099NEC, and other statements**

*	Payer Name	Payer EIN	T/S	Code	PA Taxable Comp.	PA Tax Withheld	Fed. Income
<input checked="" type="checkbox"/>	APEX CLEARING	47-0533629	T	O	50.		50.
<input type="checkbox"/>							
<input type="checkbox"/>							

**Pennsylvania Payment type:**

- |   |  |
|---|--|
| <b>A</b> Executor fee   | <b>H</b> Other nonemployee compensation.<br>Describe: _____                  |
| <b>B</b> Jury duty pay  | <b>I</b> Employer sponsored retirement/pension/deferred compensation plan    |
| <b>C</b> Director's fee   | <b>J</b> Distribution from IRA (Traditional or Roth)                         |
| <b>D</b> Expert witness fee   | <b>K</b> Distribution from Life Insurance, Annuity or Endowment Contracts    |
| <b>E</b> Honorarium   | <b>L</b> Distribution from Charitable Gift Annuities                         |
| <b>F</b> Covenant not to compete  | <b>M</b> Distribution from Employee Stock Ownership Plan.<br>Describe: _____ |
| <b>G</b> Damages or settlement for lost wages, other than personal injury | <b>N</b> Fiduciary fees from a trust   |
|   | <b>O</b> Other income not listed above<br>Describe: <u>1099-MISC</u>         |

	<b>Taxpayer</b>	<b>Spouse</b>
Miscellaneous Compensation from Form 1099MISC/1099K/1099NEC.	_____	_____
Withholding . . . . .	_____	_____

**Compensation from Federal Forms 1099R**

*	Payer's EIN Payer's Name	T S	Fed #	PA Type	Gross Distribution	Basis	PA Taxable	PA Tax Withheld
<input type="checkbox"/>	_____							
<input type="checkbox"/>	_____							
<input type="checkbox"/>	_____							
<input type="checkbox"/>	_____							

\* Enter an 'X' if this income is **Not** subject to Pennsylvania tax - PA Part-Year and Nonresidents Only.

**Pennsylvania Distribution type:**

- |   |   |
|---|---|
| <b>N</b> No entry   | <b>I22</b> I'm not eligible yet; plan is eligible in PA |
| <b>I31</b> PA school, state, or municipal employee plan                                       | <b>J1</b> Traditional or Roth IRA; I'm over 59.5        |
| <b>I11</b> United Mine Workers pension  | <b>J2</b> Traditional or Roth IRA; I'm under 59.5       |
| <b>I32</b> Military pension   | <b>K2</b> Non-qualified deferred compensation plan      |
| <b>I33</b> U.S. Civil service retirement/disability/annuity                                   | <b>K3</b> Life insurance or endowment                   |
| <b>K1</b> Annuity or Non-civil service disability (including Qual Joint Survivorship Annuity) | <b>L</b> Distribution from Charitable Gift Annuities    |
| <b>I21</b> Early distribution from a retirement plan  | <b>M1</b> ESOP: Allocated ESOP Stock Dividend           |
| <b>I12</b> Rollover   | <b>M2</b> ESOP: Non-Allocated ESOP Stock Dividend       |
| <b>I13</b> I'm eligible; plan is eligible (no PA tax)   | <b>M3</b> KSOP: Taxable ESOP within a 401(k)            |
|   | <b>M4</b> KSOP: Nontaxable ESOP within a 401(k)         |

	<b>Taxpayer</b>	<b>Spouse</b>
Distribution from Life Insurance, Annuity, Endowment Contracts or . . . . . ineligible retirement plans (see Tax Help FAQ's for more info) . . . . .	_____	_____
Distribution from Charitable Gift Annuities . . . . .	_____	_____
Compensation from Form 1099R (eligible retirement plans) . . . . .	_____	_____
Withholding . . . . .	_____	_____

**Total Gross Compensation**

	<b>Taxpayer</b>	<b>Spouse</b>
Total gross compensation to Form PA-40 line 1a . . . . .	156,000.	0.
Total Schedule NRH gross compensation to PA-40, line 12 . . . . .	_____	_____
Withholding to Form PA-40 line 13 . . . . .	4,789.	_____

Total gross compensation to Form PA-40 line 1a . . . . .	156,000.
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\* Enter an 'X' if this income is **Not** subject to Pennsylvania tax.

### Additional information from your 2021 Pennsylvania Tax Return

**PA Sch D: Sale, Exchange or Disposition of Property (Taxpayer)**

**Disposition of Property**

**Continuation Statement**

Description	Date Acquired	Date Sold	Gross Sale Price	Cost	L o s s	Gain or Loss
VANGUARD	01/01/20	12/31/21	22.	0.		22.
ADABTC	01/01/19	12/31/21	20,700.	1,200.		19,500.
ADABTC	01/01/20	12/31/21	76,000.	2,800.		73,200.
Form 1099-B INTERACT	12/31/21	12/31/21	0.	1,111.	tru e	1,111.
Form 1099-B VANGUARD	12/31/21	12/31/21	0.	1,480.	tru e	1,480.
<b>Total</b>			96,722.	6,591.		