Form **8879**

(Rev. January 2021)

Department of the Treasury Internal Revenue Service

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

► Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

| Submission Identification Number (SID) | | • | |
|---|---|--|--|
| Taxpayer's name | Social secu | rity numb | er |
| VARUN GURUVARAM | 9-5715 | | |
| Spouse's name | | rity number | |
| VEENA CHIDURALA | 684-7 | 5-6336 | 5 |
| Part I Tax Return Information — Tax Year Ending December 31, | 2021 (Enter year you | are aut | horizina.) |
| Enter whole dollars only on lines 1 through 5. | | | |
| Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank. | | | |
| 1 Adjusted gross income | | 11 | 166,347. |
| 2 Total tax | | 2 | 22,436. |
| 3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099 | | 3 | 23,739. |
| 4 Amount you want refunded to you | | 4 | 1,303. |
| 5 Amount you owe | | 5 | , |
| Part II Taxpayer Declaration and Signature Authorization (Be sur | re you get and keep a co | py of y | our return) |
| my knowledge and belief, it is true, correct, and complete. I further declare that the am return (original or amended) I am now authorizing. I consent to allow my intermediate serv to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receive for any delay in processing the return or refund, and (c) the date of any refund. If applicable Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial inspayment of my federal taxes owed on this return and/or a payment of estimated tax, and the authorization is to remain in full force and effect until I notify the U.S. Treasury Financia payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payments business days prior to the payment (settlement) date. I also authorize the financial institut taxes to receive confidential information necessary to answer inquiries and resolve issurpersonal identification number (PIN) below is my signature for the income tax return (original Electronic Funds Withdrawal Consent. | ice provider, transmitter, or elec- ipt or reason for rejection of the ble, I authorize the U.S. Treasury stitution account indicated in the the financial institution to debit that Il Agent to terminate the authorient cancellation requests must cions involved in the processing ues related to the payment. I fu | tronic returnsmis and its datax prepare entry to zation. The receive of the electrical transfer action and transfer action and transfer actions. | urn originator (ERO) sion, (b) the reasor lesignated Financia aration software for this account. This or revoke (cancel) ared no later than 2 ectronic payment of knowledge that the |
| Taxpayer's PIN: check one box only | Г | | |
| <u></u> - | enter or generate my PIN | 9 5 7 | 1 5 as my |
| ERO firm name signature on the income tax return (original or amended) I am now authorized to the income tax return (original or amended). | E C | nter five o | digits, but |
| I will enter my PIN as my signature on the income tax return (original or if you are entering your own PIN and your return is filed using the Pracebelow. | | | |
| Your signature ▶ | Date ▶ | | |
| Spouse's PIN: check one box only | | | |
| · _ | er amended) I am now authori | l on't enter zing. Ch | digits, but rall zeros eck this box only |
| Spouse's signature ▶ | Date ▶ | | |
| Practitioner PIN Method Returns Only— | | | |
| Part III Certification and Authentication — Practitioner PIN Method | od Only | | |
| ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected | | 8 6 nter all ze | 1 9 8 9 ros |
| I certify that the above numeric entry is my PIN, which is my signature for the electronic authorized to file for tax year indicated above for the taxpayer(s) indicated above. I con requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS | firm that I am submitting this re | turn in a | ccordance with the |
| ERO's signature ▶ | Date ► | | |
| ERO Must Retain This Form — See | Instructions | | |

Don't Submit This Form to the IRS Unless Requested To Do So

E 1040 Department of the Treasury—Internal Revenue Service (99)
U.S. Individual Income Tax Return

IRS Use Only—Do not write or staple in this space.

| Filing Status Check only one box. | If yo | Single Married filing jointly under the new checked the MFS box, enter the new son is a child but not your dependent | ame of | ied filing separately (| , | _ | | , | . – | _ | | | |
|--|---|--|----------|--------------------------------|------------|-----------------|-----------------------------|----------------|------------|--|------------------------------------|-----------------|--|
| Your first name | our first name and middle initial Last name | | | | | Y | Your social security number | | | | | | |
| VARUN | | | GUR | UVARAM | | | | | 3 | 310-49-5715 | | | |
| If joint return, s | pouse' | s first name and middle initial | Last n | ame | | | | | S | Spouse's social security number | | | |
| VEENA | | | CHI | DURALA | | | | | 6 | 684-75-6336 | | | |
| Home address | (numb | er and street). If you have a P.O. box, see | instruc | tions. | | | | Apt. no. | F | Presidential Election Campa | | | |
| 5500 ST | ATE | HIGHWAY 121,#1134 | | | | | | | | Check here if you, or your | | | |
| City, town, or p | ost off | ice. If you have a foreign address, also co | mplete | implete spaces below. State ZI | | | | | | | spouse if filing jointly, want \$3 | | |
| LEWISVI | LLE | | TX | | | 75 | 75056 | | | to go to this fund. Checking a box below will not change | | | |
| Foreign country | y name | | | | | | Fore | eign postal co | | | or refund. | | |
| At any time du | ıring 2 | 021, did you receive, sell, exchange, | or oth | erwise dispose of an | y fina | ancial interest | in an | y virtual cu | ırrenc | y? | Yes | ⊠ No | |
| Standard Deduction | | neone can claim: You as a de Spouse itemizes on a separate retur | • | | | • | | | | | | | |
| Age/Blindness | s You | : Were born before January 2, 1 | 957 | Are blind Sp | ouse | : Was bo | orn be | fore Janua | ıry 2, | 1957 | ☐ Is bl | lind | |
| Dependents | s (see | instructions): | | (2) Social security | , | (3) Relations | hip | (4) 🗸 | if qua | lifies for | r (see instru | uctions): | |
| If more | (1) F | First name Last name | | number | | to you | | Child tax | | dit | Credit for ot | ther dependents | |
| than four | | | | | | | | | | | 1 | | |
| dependents, see instructions | | | | | | | | | | | | | |
| and check | | | | | | | | | | | | | |
| here ▶ □ | | | | | | | | | | | | | |
| | 1 | Wages, salaries, tips, etc. Attach F | orm(s) | W-2 | | | | | | 1 | 1 | 62,839. | |
| Attach | 2a | Tax-exempt interest | 2a | | b T | axable interes | st | | | 2b | | | |
| Sch. B if required. | 3a | Qualified dividends | 3a | 51. | b 0 | ordinary divide | ends | | | 3b | | 51. | |
| required. | 4a | IRA distributions | 4a | | b T | axable amou | nt . | | | 4b | | | |
| | 5a | Pensions and annuities | 5a | | b T | axable amou | nt . | | | 5b | | | |
| Standard | 6a | Social security benefits | 6a | | b T | axable amou | nt . | | | 6b | | | |
| Deduction for— | 7 | Capital gain or (loss). Attach Sche | dule D | if required. If not req | uired. | , check here | |) | ▶ □ | 7 | | 3,457. | |
| Single or Married filing | 8 | Other income from Schedule 1, line 10 | | | | | | | | 8 | | | |
| separately, \$12,550 | 9 | Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income | | | | | | | . ▶ | 9 | 1 | 66,347. | |
| Married filing | 10 | Adjustments to income from Sche | dule 1, | line 26 | | | | | | 10 | | | |
| jointly or Qualifying | 11 | Subtract line 10 from line 9. This is | | | | | | | . ▶ | 11 | 1 | 66,347. | |
| widow(er), \$25,100 | 12a | - | | | | | | | | | | | |
| • Head of | b | Charitable contributions if you take | the sta | andard deduction (see | instr | uctions) 12 | 2b | | 600. | | | | |
| household, \$18,800 | С | Add lines 12a and 12b | | | | | | | | 120 | , | 25,700. | |
| If you checked | 13 | Qualified business income deduct | ion froi | m Form 8995 or Form | າ 899 | 5-A | | | | 13 | | | |
| any box under Standard | 14 | Add lines 12c and 13 | | | | | | | 14 | | 25,700. | | |
| Deduction, see instructions. | 15 | Taxable income. Subtract line 14 from line 11. If zero or less, enter -0 | | | | | | | | 15 | 1 | 40,647. | |
| 220 111011 40110113. | | | | | | | | | | | | | |

| | 16 | Tax (see instructions). Check if any from Form | n(s): 1 881 | 4 2 🗌 4972 | 3 🗌 _ | | | 16 | 22,436. | |
|-------------------------------|---------|---|--------------------|----------------------------|------------|-----------------|-------------------|--|-------------------------|--|
| | 17 | Amount from Schedule 2, line 3 | | | | | | 17 | | |
| | 18 | Add lines 16 and 17 | | | | | | 18 | 22,436. | |
| | 19 | Nonrefundable child tax credit or credit for | other depender | nts from Schedule | e 8812 | | | 19 | | |
| | 20 | Amount from Schedule 3, line 8 | | | | | | 20 | | |
| | 21 | Add lines 19 and 20 | | | | | | 21 | | |
| | 22 | Subtract line 21 from line 18. If zero or less, | enter -0 | | | | | 22 | 22,436. | |
| | 23 | Other taxes, including self-employment tax, | , from Schedule | e 2, line 21 . | | | | 23 | 0. | |
| | 24 | Add lines 22 and 23. This is your total tax | | | | | • | 24 | 22,436. | |
| | 25 | Federal income tax withheld from: | | | | | | | | |
| | а | Form(s) W-2 | | | 25a | 23,7 | 39. | | | |
| | b | Form(s) 1099 | | | 25b | | | | | |
| | С | Other forms (see instructions) | | | 25c | | | | | |
| | d | Add lines 25a through 25c | | | | | | 25d | 23,739. | |
| If you have a | 26 | 2021 estimated tax payments and amount a | applied from 20 | | | | | 26 | | |
| qualifying child, | 27a | Earned income credit (EIC) | | No | 27a | | | | | |
| attach Sch. EIC. | | Check here if you were born after Janu | | | | | | | | |
| | | January 2, 2004, and you satisfy all the | | | | | | | | |
| | h | taxpayers who are at least age 18, to claim Nontaxable combat pay election | 1 1 | structions - | | | | | | |
| | b | | | | - | | | | | |
| | с 28 | Prior year (2019) earned income | | Cabadula 9919 | 28 | | | | | |
| | 29 | American opportunity credit from Form 886 | | | 29 | | | | | |
| | 30 | Recovery rebate credit. See instructions . | • | | 30 | | | | | |
| | 31 | Amount from Schedule 3, line 15 | | | 31 | | | | | |
| | 32 | Add lines 27a and 28 through 31. These are | | | | hle credite | _ | 32 | | |
| | 33 | Add lines 25d, 26, and 32. These are your to | | | | | | 33 | 23,739. | |
| | 34 | If line 33 is more than line 24, subtract line 2 | | | | | | 34 | 1,303. | |
| Refund | 35a | Amount of line 34 you want refunded to yo | | | - | - | . 🗆 | 35a | 1,303. | |
| Direct deposit? | ▶b | Routing number 1 1 1 9 0 6 | | ▶ c Type: | Checkir | | | Jou | 273331 | |
| See instructions. | ▶d | Account number 3 6 7 7 6 2 0 | | | | | | | | |
| | 36 | Amount of line 34 you want applied to your | | ed tax | 36 | <u>.</u> | | | | |
| Amount | 37 | Amount you owe. Subtract line 33 from line | | | | uctions . | • | 37 | | |
| You Owe | 38 | Estimated tax penalty (see instructions) . | | | 38 | | | | | |
| Third Party | | you want to allow another person to dis | | | | | | | | |
| Designee | | ructions | | | | Yes. Com | olete b | elow. | X No | |
| | | ignee's | Phone | | | Persona | | | | |
| | | ne ► | no. | | | number | | | | |
| Sign | | ler penalties of perjury, I declare that I have examin ef, they are true, correct, and complete. Declaration | | | | | | | | |
| Here | | r signature | Date | Your occupation | asca on an | illioithation o | | | , | |
| | , 100 | r signature | Date | Your occupation | | | | f the IRS sent you an Identity Protection PIN, enter it here | | |
| Joint return? | | | | SOFTWARE EN | | | (see ii | e inst.) ▶ | | |
| See instructions. | Spo | use's signature. If a joint return, both must sign. | Date | Date Spouse's occupation I | | | | | nt your spouse an | |
| Keep a copy for your records. | , | | | | | _ | Identi (see ii | ection PIN, enter it here | | |
| , | | TEACHING FELLOW | | | | | | 151.) | | |
| | | one no. (940)703-9220 parer's name Preparer's signa | Email address | GURUVARAMVA | _ | | ΓIN | | Charle if | |
| Paid | | 1 | | מווחתה החתווי | Date | | | 1702 | Check if: Self-employed | |
| Preparer | | YAM PRIYA RAM SAGAR GUPTA TALLAM SYAM PRIYA RAM SAGAR GUPTA TALLAM 03/30/2022 P02082 | | | | | | | | |
| Use Only | | n's name ► GLOBAL TAXES LLC | | ~ CA 20041 | | | | | 678)965-9522 | |
| | | n's address ▶ 2530 Pebble Creek I | Ln Cumming | | | | Firm's | s EIN ▶ | | |
| Go to www.irs.go | ov/Form | 1040 for instructions and the latest information. | | BAA | REV 03/1 | 9/22 PRO | | | Form 1040 (2021) | |

Form 1040 (2021)

Page **2**

SCHEDULE D (Form 1040)

Capital Gains and Losses

OMB No. 1545-0074

Attachment Sequence No. 12

Department of the Treasury Internal Revenue Service (99) ► Attach to Form 1040, 1040-SR, or 1040-NR.

▶ Go to www.irs.gov/ScheduleD for instructions and the latest information. ▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

Name(s) shown on return Your social security number 310-49-5715 VARUN GURUVARAM & VEENA CHIDURALA

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss. Short-Term Capital Gains and Losses - Generally Assets Held One Year or Less (see instructions) Part I See instructions for how to figure the amounts to enter on the (h) Gain or (loss) (g) Adjustments Subtract column (e) lines below. Proceeds Cost to gain or loss from from column (d) and This form may be easier to complete if you round off cents to Form(s) 8949, Part I, combine the result (sales price) (or other basis) whole dollars. with column (g) line 2. column (a) 1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b . **1b** Totals for all transactions reported on Form(s) 8949 with Box A checked 81,813. 78,375. 19. 3,457. Totals for all transactions reported on Form(s) 8949 with Box B checked 3 Totals for all transactions reported on Form(s) 8949 with Box C checked Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 4 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from 5 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover 6 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h), If you have any longterm capital gains or losses, go to Part II below. Otherwise, go to Part III on the back 7 3,457. Part II Long-Term Capital Gains and Losses - Generally Assets Held More Than One Year (see instructions) See instructions for how to figure the amounts to enter on the (h) Gain or (loss) (g) Adjustments Subtract column (e) (d) (e) lines below. Proceeds to gain or loss from from column (d) and Cost This form may be easier to complete if you round off cents to Form(s) 8949, Part II, (sales price) (or other basis) combine the result whole dollars. line 2. column (a) with column (a) 8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b . 8b Totals for all transactions reported on Form(s) 8949 with Totals for all transactions reported on Form(s) 8949 with Box E checked 10 Totals for all transactions reported on Form(s) 8949 with 11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) 11 12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 12 13 14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover 14 15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III 15

Schedule D (Form 1040) 2021 Page 2

Part III **Summary** 16 Combine lines 7 and 15 and enter the result 16 3,457. • If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22. 17 Are lines 15 and 16 both gains? ☐ **Yes.** Go to line 18. No. Skip lines 18 through 21, and go to line 22. 18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet 18 19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet . 19 20 Are lines 18 and 19 both zero or blank and are you not filing Form 4952? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 16. Don't complete lines 21 and 22 below. □ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below. If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: 21 • The loss on line 16; or 21 • (\$3,000), or if married filing separately, (\$1,500) Note: When figuring which amount is smaller, treat both amounts as positive numbers. Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? 22 X Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 16. No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.

Sales and Other Dispositions of Capital Assets

Department of the Treasury Internal Revenue Service Name(s) shown on return

▶ Go to www.irs.gov/Form8949 for instructions and the latest information.

Attachment

OMB No. 1545-0074

▶ File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Sequence No. 12A

Social security number or taxpayer identification number 310-49-5715

Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term transactions, see page 2.

> Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box A. B. or C below. Check only one box. If more than one box applies for your short-term transactions. complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

| X (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above) □ (B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS □ (C) Short-term transactions not reported to you on Form 1099-B | | | | | | | | | | |
|--|--|--|---|---|--|---|--|--|--|--|
| 1 (a) Description of property | (b) Date acquired (Mo., day, yr.) | (c) Date sold or disposed of (Mo., day, yr.) | (d) Proceeds (sales price) (see instructions) | (e) Cost or other basis. See the Note below | Adjustment, if If you enter an enter a co See the sep | (h) Gain or (loss). Subtract column (e) | | | | |
| (Example: 100 sh. XYZ Co.) | | | | and see Column (e) in the separate instructions | (f) Code(s) from instructions | (g) Amount of adjustment | from column (d) and combine the result with column (g) | | | |
| Coinbase | 01/01/21 | 11/04/21 | 1,334. | 1,010. | | | 324. | | | |
| Robinhood Securities LLC | 01/01/21 | 09/22/21 | 10,722. | 9,633. | W | 19. | 1,108. | | | |
| Robinhood Crypto LLC | 01/01/21 | 10/29/21 | 65,625. | 63,996. | | | 1,629. | | | |
| Merrill Lynch, Pierce, Fenner & Smith Inc | 03/16/21 | 09/01/21 | 4,132. | 3,736. | | | 396. | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
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| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| 2 Totals. Add the amounts in columns negative amounts). Enter each tota Schedule D, line 1b (if Box A above above is checked), or line 3 (if Box (| al here and inc is checked), lir | lude on your ne 2 (if Box B | 81,813. | 78,375. | | 19. | 3,457. | | | |

Note: If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Form **8889**

Department of the Treasury

Internal Revenue Service

Health Savings Accounts (HSAs)

► Attach to Form 1040, 1040-SR, or 1040-NR.
 Go to www.irs.gov/Form8889 for instructions and the latest information.

OMB No. 1545-0074

2021

Attachment Sequence No. 52

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

VARUN GURUVARAM

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions ▶ 310-49-5715

| Betoi | re you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, it | require | ea. | |
|--------------|---|---------|--------|----------|
| Part | HSA Contributions and Deduction. See the instructions before completing this part. If y and both you and your spouse each have separate HSAs, complete a separate Part I for | | | |
| 1 | Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2021. See instructions | ☐ Self- | only | ▼ Family |
| 2 | HSA contributions you made for 2021 (or those made on your behalf), including those made from January 1, 2022, through April 15, 2022, that were for 2021. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions | 2 | | 0. |
| 3 | If you were under age 55 at the end of 2021 and, on the first day of every month during 2021, you were, or were considered, an eligible individual with the same coverage, enter \$3,600 (\$7,200 for family coverage). All others, see the instructions for the amount to enter | 3 | | 7,200. |
| 4 | Enter the amount you and your employer contributed to your Archer MSAs for 2021 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2021, also include any amount contributed to your spouse's Archer MSAs | 4 | | 0. |
| 5 6 | Subtract line 4 from line 3. If zero or less, enter -0 | 6 | | 7,200. |
| 7 | If you were age 55 or older at the end of 2021, married, and you or your spouse had family coverage under an HDHP at any time during 2021, enter your additional contribution amount. See instructions | 7 | | |
| 8 9 10 | Add lines 6 and 7 | 8 | | 7,200. |
| 11 | Add lines 9 and 10 | 11 | | 975. |
| 12 13 | Subtract line 11 from line 8. If zero or less, enter -0 | 12 | | 6,225. |
| | Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions. | | | |
| Part | HSA Distributions. If you are filing jointly and both you and your spouse each have separate Part II for each spouse. | rate HS | SAs, d | complete |
| 14a | Total distributions you received in 2021 from all HSAs (see instructions) | 14a | | |
| b | Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions | 14b | | |
| C | Subtract line 14b from line 14a | 14c | | |
| 15 | Qualified medical expenses paid using HSA distributions (see instructions) | 15 | | |
| 16 | Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0 Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8e | 16 | | |
| 17a | If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here | | | |
| b | Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c | 17b | | |
| Part | | | | |
| 18 | Last-month rule | 18 | | |
| 19 | Qualified HSA funding distribution | 19 | | |
| 20 | Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8z, and enter "HSA" and the amount on the dotted line | 20 | | |
| 21 | Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d | 21 | | |