

# 2022 W-2 and EARNINGS SUMMARY

This Summary is included with your W-2 to help describe portions in more detail. The reverse side includes information that will also be helpful.

Your Gross Pay was adjusted as follows to produce your W-2 Statement.

|   |                         |                           |                        |
|---|-------------------------|---------------------------|------------------------|
| Employee Reference Copy<br>Wage and Tax Statement   |                         | 2022<br>OMB No. 1545-0008 |                        |
| d Control number  | Dept. 0726              | Corp.                     | Employer use only 5501 |
| c Employer's name, address, and ZIP code<br>CREDIT SUISSE (USA), INC.<br>ELEVEN MADISON AVENUE<br>NEW YORK, NY 10010    |                         |                           |                        |
| e/f Employee's name, address, and ZIP code<br>HARIOM HIMANSHU MEHTA<br>14 POPLAR STREET<br>FL2<br>JERSEY CITY, NJ 07307 |                         |                           |                        |
| b Employer's FED ID number  | a Employee's SSA number | 13-1898818 XXX-XX-6564    |                        |
| 1 Wages, tips, other comp. 102,342.20 2 Federal income tax withheld 15344.03  |                         |                           |                        |
| 3 Social security wages 26796.90 4 Social security tax withheld 1661.41   |                         |                           |                        |
| 5 Medicare wages and tips 26796.90 6 Medicare tax withheld 388.56   |                         |                           |                        |
| 7 Social security tips 8 Allocated tips   |                         |                           |                        |
| 9 10 Dependent care benefits  |                         |                           |                        |
| 11 Nonqualified plans<br>12a See instructions for box 12 C   34.50  |                         |                           |                        |
| 14 Other 423.71 NY/PFL 31.20 NY/NUSTD 337.50  |                         |                           |                        |
| 12c DD 8245.32  |                         |                           |                        |
| 12d   |                         |                           |                        |
| 13 Stat emp   Ret. plan   3rd party sick pay X  |                         |                           |                        |
| 15 State Employer's state ID no. 16 State wages, tips, etc. NJ 131-898-818/000 104383.16                                |                         |                           |                        |
| 17 State income tax 18 Local wages, tips, etc.  |                         |                           |                        |
| 19 Local income tax 20 Locality name  |                         |                           |                        |

|  |           |                                    |           |                             |           |
|--|-----------|------------------------------------|-----------|-----------------------------|-----------|
| Wages, Tips, Other Compensation Box 1 of W-2 |           | Social Security Wages Box 3 of W-2 |           | Medicare Wages Box 5 of W-2 |           |
| 104,499.92                                   |           | 104,499.92                         |           | 104,499.92                  |           |
| GT Life                                      | 34.50     | 34.50                              | 34.50     | 34.50                       | 34.50     |
| LTD Imp                                      | 186.24    | 186.24                             | 186.24    | 186.24                      | 186.24    |
| DEN BTAX                                     | -256.80   | -256.80                            | -256.80   | -256.80                     | -256.80   |
| MED BTAX                                     | -1,710.00 | -1,710.00                          | -1,710.00 | -1,710.00                   | -1,710.00 |
| VisionBTK                                    | -74.16    | -74.16                             | -74.16    | -74.16                      | -74.16    |
| 401K   | -337.50   | -337.50                            |           |                             |           |

Other W-2 WAGES 102,342.20 -75,882.80 26,796.90 26,796.90

HARIOM HIMANSHU MEHTA  
14 POPLAR STREET  
FL2  
JERSEY CITY, NJ 07307

Social Security Number: XXX-XX-6564

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PAGE 01 OF 02

|  |                         |  |                        |
|--|-------------------------|--|------------------------|
| 1 Wages, tips, other comp. 102342.20   |                         | 2 Federal income tax withheld 15344.03 |                        |
| 3 Social security wages 26796.90   |                         | 4 Social security tax withheld 1661.41 |                        |
| 5 Medicare wages and tips 26796.90   |                         | 6 Medicare tax withheld 388.56         |                        |
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| b Employer's FED ID number   | a Employee's SSA number | 13-1898818 XXX-XX-6564                 |                        |
| 7 Social security tips 8 Allocated tips  |                         |  |                        |
| 9 10 Dependent care benefits   |                         |  |                        |
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| 12c DD 8245.32   |                         |  |                        |
| 12d  |                         |  |                        |
| 13 Stat emp   Ret. plan   3rd party sick pay X   |                         |  |                        |
| e/f Employee's name, address and ZIP code<br>HARIOM HIMANSHU MEHTA<br>14 POPLAR STREET<br>FL2<br>JERSEY CITY, NJ 07307 |                         |  |                        |
| 15 State Employer's state ID no. 16 State wages, tips, etc. NJ 131-898-818/000 104383.16                               |                         |  |                        |
| 17 State income tax 18 Local wages, tips, etc.   |                         |  |                        |
| 19 Local income tax 20 Locality name   |                         |  |                        |
| Federal Filing Copy<br>Wage and Tax Statement  |                         |  |                        |

|  |                         |  |                        |
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| 1 Wages, tips, other comp. 102342.20   |                         | 2 Federal income tax withheld 15344.03 |                        |
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| 12c DD 8245.32   |                         |  |                        |
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| e/f Employee's name, address and ZIP code<br>HARIOM HIMANSHU MEHTA<br>14 POPLAR STREET<br>FL2<br>JERSEY CITY, NJ 07307 |                         |  |                        |
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| NJ, State Reference Copy<br>Wage and Tax Statement   |                         |  |                        |

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| 1 Wages, tips, other comp. 102342.20   |                         | 2 Federal income tax withheld 15344.03 |                        |
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| 12c DD 8245.32   |                         |  |                        |
| 12d  |                         |  |                        |
| 13 Stat emp   Ret. plan   3rd party sick pay X   |                         |  |                        |
| e/f Employee's name, address and ZIP code<br>HARIOM HIMANSHU MEHTA<br>14 POPLAR STREET<br>FL2<br>JERSEY CITY, NJ 07307 |                         |  |                        |
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| NJ, State Filing Copy<br>Wage and Tax Statement  |                         |  |                        |

W-2  
OMB No. 1545-0008  
Copy B to be filed with employee's Federal Income Tax Return.

W-2  
OMB No. 1545-0008  
Copy 2 to be filed with employee's State Income Tax Return.

W-2  
OMB No. 1545-0008  
Copy 2 to be filed with employee's State Income Tax Return.

# 2022 W-2 and EARNINGS SUMMARY

This Summary is included with your W-2 to help describe portions in more detail. The reverse side includes information that will also be helpful.

Your Gross Pay was adjusted as follows to produce your W-2 Statement.

|   |                                 |                        |                    |
|---|---------------------------------|------------------------|--------------------|
| NY, State Reference Copy  |                                 | Wage and Tax Statement | 2022               |
| Copy 2 to be filed with employee's State Income Tax Return                |                                 | OMB No. 1545-0008      |                    |
| d Control number  | Dept.                           | Corp.                  | Employer use only  |
| 0957416966 WDN  | 0726                            |                        | 5502               |
| c Employer's name, address, and ZIP code                                  |                                 |                        |                    |
| CREDIT SUISSE (USA), INC.<br>ELEVEN MADISON AVENUE<br>NEW YORK, NY 10010  |                                 |                        |                    |
| e/f Employee's name, address, and ZIP code                                |                                 |                        |                    |
| HARIOM HIMANSHU MEHTA<br>14 POPLAR STREET<br>FL2<br>JERSEY CITY, NJ 07307 |                                 |                        |                    |
| b Employer's FED ID number  | a Employee's SSA number         |                        |                    |
| 13-1898818  | XXX-XX-6564                     |                        |                    |
| 1 Wages, tips, other comp.  | 2 Federal income tax withheld   |                        |                    |
| 102342.20   | 15344.03                        |                        |                    |
| 3 Social security wages   | 4 Social security tax withheld  |                        |                    |
| 26796.90  | 1661.41                         |                        |                    |
| 5 Medicare wages and tips   | 6 Medicare tax withheld         |                        |                    |
| 26796.90  | 388.56                          |                        |                    |
| 7 Social security tips  | 8 Allocated tips                |                        |                    |
|   |                                 |                        |                    |
| 9   | 10 Dependent care benefits      |                        |                    |
|   |                                 |                        |                    |
| 11 Nonqualified plans   | 12a See instructions for box 12 |                        |                    |
|   | C                               | 34.50                  |                    |
| 14 Other  | 423.71 NY/PFL                   | 337.50                 |                    |
|   | 31.20 NY/NUSTD                  | 8245.32                |                    |
|   | 12d                             |                        |                    |
|   | 13 Stat emp                     | Rel. plan              | 3rd party sick pay |
|   |                                 | X                      |                    |
| 15 State Employer's state ID no.  | 16 State wages, tips, etc.      |                        |                    |
| NY  | 131898818 8                     | 102342.20              |                    |
| 17 State income tax   | 18 Local wages, tips, etc.      |                        |                    |
| 5690.37   |                                 |                        |                    |
| 19 Local income tax   | 20 Locality name                |                        |                    |
|   |                                 |                        |                    |

Social Security Number: XXX-XX-6564

HARIOM HIMANSHU MEHTA  
14 POPLAR STREET  
FL2  
JERSEY CITY, NJ 07307

|           | Wages, Tips, Other Compensation<br>Box 1 of W-2 | Social Security Wages<br>Box 3 of W-2 | Medicare Wages<br>Box 5 of W-2 |
|-----------|---|---------------------------------------|--------------------------------|
| GROSS PAY | 104,499.92                                      | 104,499.92                            | 104,499.92                     |
| GT Life   | 34.50   | 34.50                                 | 34.50                          |
| LTD Imp   | 186.24  | 186.24                                | 186.24                         |
| MEN BTAX  | -256.80   | -256.80                               | -256.80                        |
| DED BTAX  | -1,710.00                                       | -1,710.00                             | -1,710.00                      |
| VisionBTK | -74.16  | -74.16                                | -74.16                         |
| 401K      | -337.50   |                                       |                                |

Other W-2 WAGES 102,342.20 -75,882.80 26,796.90

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PAGE 02 OF 02

|   |                                 |           |                    |
|---|---------------------------------|-----------|--------------------|
| 1 Wages, tips, other comp.  | 2 Federal income tax withheld   |           |                    |
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| 0957416966 WDN  | 0726                            |           | 5502               |
| c Employer's name, address, and ZIP code                                  |                                 |           |                    |
| CREDIT SUISSE (USA), INC.<br>ELEVEN MADISON AVENUE<br>NEW YORK, NY 10010  |                                 |           |                    |
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| 13-1898818  | XXX-XX-6564                     |           |                    |
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|   |                                 |           |                    |
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|   | C                               | 34.50     |                    |
| 14 Other  | 423.71 NY/PFL                   | 337.50    |                    |
|   | 31.20 NY/NUSTD                  | 8245.32   |                    |
|   | 12d                             |           |                    |
|   | 13 Stat emp                     | Rel. plan | 3rd party sick pay |
|   |                                 | X         |                    |
| e/f Employee's name, address and ZIP code                                 |                                 |           |                    |
| HARIOM HIMANSHU MEHTA<br>14 POPLAR STREET<br>FL2<br>JERSEY CITY, NJ 07307 |                                 |           |                    |
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| NY  | 131898818 8                     | 102342.20 |                    |
| 17 State income tax   | 18 Local wages, tips, etc.      |           |                    |
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|   |                                 |           |                    |

|   |  |                        |      |
|---|--|------------------------|------|
| NY, State Filing Copy                                       |  | Wage and Tax Statement | 2022 |
| Copy 2 to be filed with employee's State Income Tax Return. |  | OMB No. 1545-0008      |      |

**Box 1.** Enter this amount on the wages line of your tax return.  
**Box 2.** Enter this amount on the federal income tax withheld line of your tax return.

**Box 3.** You may be required to report this amount on Form 8959, Additional Medicare Tax. See the Form 1040 instructions to determine if you are required to complete Form 8959.

**Box 6.** This amount includes the 1.45% Medicare Tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.

**Box 8.** This amount is not included in box 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Form 1040 instructions.

You must file Form 4137, Social Security and Medicare Tax on Unreported Tip Income, with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. Enter this amount on the wages line of your tax return. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

**Box 10.** This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over your employer's plan limit is also included in box 1. See Form 2441.

**Box 11.** This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan, or (b) included in box 3 and/or box 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.

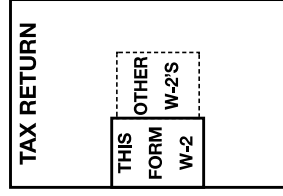
**Box 12.** The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$20,500 (\$14,000 if you only have SIMPLE plans; \$23,500 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$20,500. Deferrals under code H are limited to \$7,000.

## NOTE: THESE ARE SUBSTITUTE WAGE AND TAX STATEMENTS AND ARE ACCEPTABLE FOR FILING WITH YOUR FEDERAL, STATE AND LOCAL/CITY INCOME TAX RETURNS.

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

### IMPORTANT NOTE:

In order to insure efficient processing, attach this W-2 to your tax return like this (following agency instructions):



have either an additional deferral of up to \$6,300 (\$3,000 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Form 1040 instructions.

**Note:** If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

**A**—Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

**B**—Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

**C**—Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to the social security wage base), and 5)

**D**—Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.

**E**—Elective deferrals under a section 403(b) salary reduction agreement

**F**—Elective deferrals under a section 408(k)(6) salary reduction SEP

**G**—Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan

**H**—Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Form 1040 instructions for how to deduct.

**J**—Nontaxable sick pay (information only, not included in box 1, 3, or 5)

**K**—20% excise tax on excess golden parachute payments. See the Form 1040 instructions.

**L**—Substantiated employee business expense reimbursements (nontaxable)

**M**—Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.

**N**—Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.

**P**—Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in box 1, 3, or 5)

**Q**—Nontaxable combat pay. See the Form 1040 instructions for details on reporting this amount.

**R**—Employer contributions to your Archer MSA. Report on Form 8853, Archer MSAs and Long-Term Care Insurance Contracts.

**S**—Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1)

Department of the Treasury - Internal Revenue Service

**V**—Income from exercise of nonstatutory stock option(s) (line boxes 1, 3 (up to the social security wage base), and 5). See Taxable and Nontaxable Income, for reporting requirements

**W**—Employer contributions (including amounts the employer contribute using a section 125 (cafeteria) plan) to your health account. Report on Form 8889, Health Savings Accounts (HSA)

**Y**—Deferrals under a section 409A nonqualified deferred compensation plan

**Z**—Income under a nonqualified deferred compensation plan (line box 1). This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.

**AA**—Designated Roth contributions under a section 401(k) plan

**BB**—Designated Roth contributions under a section 403(b) plan

**DD**—Cost of employer-sponsored health coverage. The amount reported with code DD is not taxable.

**EE**—Designated Roth contributions under a governmental or 457(b) plan. This amount is also included in box 1. It is to an additional 20% tax plus interest. See the Form 1040 instructions

**FF**—Permitted benefits under a qualified small employer health reimbursement arrangement

**GG**—Income from qualified equity grants under section 83(i) of the calendar year

**HH**—Aggregate deferrals under section 83(i) elections as of the calendar year

**Box 13.** If the "Retirement plan" box is checked, special limits to the amount of traditional IRA contributions you may deduct (390-A, Contributions to Individual Retirement Arrangements)

**Box 14.** Employers may use this box to report information on state disability insurance taxes withheld, union dues, uniform health insurance premiums deducted, nontaxable income, ex assistance payments, or a member of the clergy's parsonage and utilities. Railroad employers use this box to report railroad retirement (RRTA) compensation, Tier 1 tax, Tier 2 tax, Med and Additional Medicare Tax. Include tips reported by the employer in railroad retirement (RRTA) compensation.

**Note:** Keep Copy C of Form W-2 for at least 3 years after filing your income tax return. However, to help protect your security benefits, keep Copy C until you begin receiving social security benefits, just in case there is a question about your record and/or earnings in a particular year.

Department of the Treasury - Internal Revenue Service

## Notice to Employee

**Do you have to file?** Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

**Earned income credit (EIC).** You may be able to take the EIC for 2022 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2022 or if income is earned for services provided while you were an inmate at a penal institution. For 2022 income limits and more information, visit [www.irs.gov/EITC](http://www.irs.gov/EITC). See also Pub. 596, Earned Income Credit. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

**Employee's social security number (SSN).** For your protection, this form may show only the last four digits of your SSN. However, your employer has reported your complete SSN to the IRS and the Social Security Administration (SSA).

**Clergy and religious workers.** If you aren't subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.

Department of the Treasury - Internal Revenue Service

Department of the Treasury - Internal Revenue Service

Department of the Treasury - Internal Revenue Service