Form **8879** (Rev. January 2021)

IRS e-file Signature Authorization

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service ERO must obtain and retain completed Form 8879.
 Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID)

Taxpayer's name Social security number RAVI THEJA JEETURI 353-67-8096 Spouse's name Spouse's social security number 090-71-0267 KAVITA SHAH Tax Return Information — Tax Year Ending December 31, 2022 (Enter year you are authorizing.) Part I 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. 207,862. 1 1 27,342. 2 2 3 3 30,136. 4 4 Amount you want refunded to you 3,453. 5 Amount you owe 5

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at **1-888-353-4537**. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's	PIN:	check	one	box	only
------------	------	-------	-----	-----	------

X	lauthorize GLOBAL TAXES LLC	to enter or generate my PIN
	ERO firm name	 Enter five digits, but don't enter all zeros
	signature on the income tax return (original or amended) I am nov	v authorizing.
	I will enter my PIN as my signature on the income tax return (orig	
	if you are entering your own PIN and your return is filed using th	ne Practitioner PIN method. The ERO must complete Part III
	below.	02/05/2022
Your sig	gnature►	Date ► 03/05/2023
Spouse	e's PIN: check one box only $^{\vee}$	
×	lauthorize GLOBAL TAXES LLC	to enter or generate my PIN 1 0 2 6 7 as my
	ERO firm name	Enter five digits, but
	signature on the income tax return (original or amended) I am nov	v authorizing. don't enter all zeros
	I will enter my PIN as my signature on the income tax return (orig	inal or amended) I am now authorizing. Check this box only
	if you are entering your own PIN and your return is filed using th	ne Practitioner PIN method. The ERO must complete Part III
	below.	
	$\sqrt{\sqrt{2}}$	07 /0E /7077
0	YANC.	_{Date} ▶ 03/05/2023
Spouse	's signature	Dator
	Practitioner PIN Method Returns	
Part II	I Certification and Authentication – Practitioner PIN	Method Only
ERO's I	EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-	selected PIN. 2 2 2 4 9 6 6 1 9 8 9
ERO's I	EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-	selected PIN. 2 2 2 4 9 6 6 1 9 8 9 Don't enter all zeros
ERO's I	EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-	
I certify t	that the above numeric entry is my PIN, which is my signature for the elec	Don't enter all zeros
I certify t authorize		Don't enter all zeros ctronic individual income tax return (original or amended) I am now e. I confirm that I am submitting this return in accordance 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

1040		artment of the Treasury—Internal Revenue Servi S. Individual Income Tax		urn	202	2	OMB No. 1545	-0074	IRS Use Only	—Do not w	rite or staple in	this space.
Filing Status Check only one box.	lf yo	Single X Married filing jointly u checked the MFS box, enter the na son is a child but not your dependent	ame of y	-						spor	use (QSS)	-
Your first name	and mi	iddle initial	Last na	ime						Your so	cial security	number
RAVI THE	JA		JEEI	URI						353-	67-8096	
If joint return, sp	ouse's	s first name and middle initial	Last na	ime						Spouse'	s social secu	irity numbei
KAVITA			SHAH	I						090-	71-0267	
Home address (numbe	er and street). If you have a P.O. box, see	instructi	ons.				A	Apt. no.	Preside	ntial Election	n Campaigr
543 SPUR	LOCI	K WAY									nere if you, o	
City, town, or po	ost offi	ce. If you have a foreign address, also co	mplete s	paces bel	ow.	Sta	te	ZIP c	ode		if filing jointl this fund. C	
LIBERTY	HILI	L .				T	ζ	786	42	•	ow will not c	•
Foreign country	name			Foreign pr	ovince/state/	coun	ty	Foreig	n postal code	your tax	k or refund.	Ū
											You	Spouse
Digital Assets		ny time during 2022, did you: (a) rece ange, gift, or otherwise dispose of a						-			Ves	🗙 No
Standard	Som	eone can claim: 🗌 You as a de	penden	t 🗌	Your spous	e as	a dependent					
Deduction		Spouse itemizes on a separate retur	n or you	u were a	dual-status	alier	l					
Age/Blindness	You	Were born before January 2, 1	958 F	Are bli	nd Sn	ouse	• 🗌 Was hor	n hefr	ore January 2	1958	🗌 ls blir	nd
			550 L	T				11) Check the b			
Dependents		instructions): irst name Last name		(2) 8	ocial security number	/	(3) Relationsh to you	ip (Child tax ci		Credit for othe	
lf more than four				200	-79-962	0	-		X	ouit		
ملمي مام مرما		ANA JEETURI					Daughter				L	<u></u>
see instructions	VII	ONA JEETURI		321	-37-167	1	Daughter				L	<u></u>
and check here												<u></u>
	10	Total amount from Form(s) W-2, be	ov 1 (co		tions)					. 1a		
Income	1a b	Household employee wages not re			,					. 1b		5,910.
Attach Form(s)	c	Tip income not reported on line 1a	•		. ,					. 10		
W-2 here. Also	d	Medicaid waiver payments not rep						• •		. 1d		
attach Forms W-2G and	e e	Taxable dependent care benefits f						• •		. 10		
1099-R if tax	f	Employer-provided adoption bene						• •		. 1f		
was withheld.		Wages from Form 8919, line 6 .						• •		. 1g		
lf you did not get a Form	g h	Other earned income (see instructi						• •		· · · · · · · · · · · · · · · · · · ·		0.
W-2, see	;	Nontaxable combat pay election (see	,				1	· ·				
instructions.	z	Add lines to through th		,						. 1z	22	3,910.
Attach Sch. B	2a		2a		· · ·		axable interest	· ·		0		<u>.,,,,</u>
if required.	3a	· ·	3a				rdinary divider					
	4a		4a				axable amount					
Standard	5a		5a				axable amount			. 5b		
Deduction for-	6a		6a				axable amount			. 6b		
 Single or Married filing 	c	If you elect to use the lump-sum el		method.	 check here				[
separately,	7	Capital gain or (loss). Attach Schee							[7	- 1	3,000.
\$12,950Married filing	8	Other income from Schedule 1, line								. 8		3,048.
jointly or	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,								. 9		7,862.
Qualifying spouse,	10	Adjustments to income from Sche								. 10		.,
\$25,900 • Head of	11	Subtract line 10 from line 9. This is								. 11		7,862.
household,	12	Standard deduction or itemized	-							. 12		5,900.
\$19,400 • If you checked	13	Qualified business income deducti					5-A			. 13		<u>.</u> ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
any box under	14	Add lines 12 and 13						• •		. 14		5,900.
Deduction,	15	Subtract line 14 from line 11. If zer						 е		. 15		1,962.
see instructions.			103	o, ontor -	- · · · · · · · · · · · · · · · · · · ·	- Cui		. .		. 13	<u> </u>	±, , , 02.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.

Form **1040** (2022)

Form 1040 (2022	2)								Page 2
Tax and	16	Tax (see instructions). Check	if any from Form	(s): 1 🗌 881	4 2 4972	3		. 16	31,342.
Credits	17	Amount from Schedule 2, lir	ne3					. 17	
	18	Add lines 16 and 17						. 18	31,342.
	19	Child tax credit or credit for	other dependen	ts from Sched	ule 8812			. 19	4,000.
	20	Amount from Schedule 3, lir	ne8					. 20	
	21	Add lines 19 and 20						. 21	4,000.
	22	Subtract line 21 from line 18	. If zero or less,	enter -0				. 22	27,342.
	23	Other taxes, including self-e	mployment tax,	from Schedule	e 2, line 21			. 23	0.
	24	Add lines 22 and 23. This is	your total tax					. 24	27,342.
Payments	25	Federal income tax withheld							
	а	Form(s) W-2				25a	30,1	36.	
	b	Form(s) 1099				25b			
	с	Other forms (see instruction	s)			25c			
	d	Add lines 25a through 25c						. 25d	30,136.
If you have a	26	2022 estimated tax payment	ts and amount a	pplied from 20	21 return			. 26	
qualifying child,	27	Earned income credit (EIC)			No	27			
attach Sch. EIC.	28	Additional child tax credit from	m Schedule 8812	2		28			
	29	American opportunity credit	from Form 8863	8, line 8		29			
	30	Reserved for future use .				30			
	31	Amount from Schedule 3, lir	ne 15			31	6	59.	
	32	Add lines 27, 28, 29, and 31	. These are your	total other pa	ayments and refu	indable cre	edits .	. 32	659.
	33	Add lines 25d, 26, and 32. T	hese are your to	otal payments				. 33	30,795.
Refund	34	If line 33 is more than line 24	1, subtract line 2	4 from line 33.	This is the amour	nt you over	paid .	. 34	3,453.
nerana	35a	Amount of line 34 you want			is attached, chec	k here .		35a	3,453.
Direct deposit?	b	Routing number 0 2 2	3 0 0 1	7 3	c Type: 🛛 🗙	Checking	🗌 Savi	ngs	
See instructions.	d	Account number 6 3 0	5 9 7 1	2 3					
	36	Amount of line 34 you want	applied to your	2023 estimate	edtax	36			
Amount	37	Subtract line 33 from line 24							
You Owe	00	For details on how to pay, g				1 1		. 37	
Think Down	38	Estimated tax penalty (see in				38			
Third Party		you want to allow another			n with the IRS?		es Com	lete below.	× No
Designee		signee's		· · · · · Phone		•		identification	
	nai			no.			number (l		
Sign		der penalties of perjury, I declare t							
Here		ief, they are true, correct, and com	ipiete. Declaration (ormation of		, 0
	Yo	ur signature		Date	Your occupation				ent you an Identity PIN, enter it here
Joint return?					SOFTWARE E	NGINEE	R	(see inst.)	
See instructions.	Sp	ouse's signature. If a joint return, I	both must sign.	Date	Spouse's occupation	on			ent your spouse an
Keep a copy for your records.									tection PIN, enter it here
your records.					SOFTWARE E			(see inst.)	
		one no. (949) 241-577		Email address	RJSFDC1225				
Paid		eparer's name	Preparer's signat			Date	PT		Check if:
Preparer		I PRIYA RAM SAGAR GUPTA TALLAM		RAM SAGAR	GUPTA TALLAM	03/03/2	.023 PO	2082703	Self-employed
Use Only		m's name GLOBAL TAX			- 00010				(678)965-9522
			Y CT E BRU	INSWICK N	1 08810			Firm's EIN	84-3171965
Go to www.ire a	ov/Form	1010 for instructions and the late	et information						Earm 1040 (2022)

Go to www.irs.gov/Form1040 for instructions and the latest information.

BAA REV 02/24/23 PRO

Form **1040** (2022)

Additional Income and Adjustments to Income

Attach to Form 1040, 1040-SR, or 1040-NR.

Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

Attachment Sequence No. 01 Your social security number 353-67-8096

Department of the Treasury Internal Revenue Service

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Namels	shown	on Eo	rm 102	10	1040-SR (or 1040-NR	
i vanno (c	9 3110 111		1111 10-	τυ,	1040 011, 1		
RAVI	THEJA	JEE	TURI	&	KAVITA	SHAH	

Par	t I Additional Income				
1	Taxable refunds, credits, or offsets of state and local income taxes			1	
2a	Alimony received			2a	
b	Date of original divorce or separation agreement (see instructions):				
3	Business income or (loss). Attach Schedule C			3	
4	Other gains or (losses). Attach Form 4797			4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Atta	ach S	chedule E .	5	-13,048.
6	Farm income or (loss). Attach Schedule F.			6	
7	Unemployment compensation			7	
8	Other income:				
а	Net operating loss	8a (r)	
b	Gambling	8b			
С	Cancellation of debt	8c			
d	Foreign earned income exclusion from Form 2555	8d ()	
е	Income from Form 8853	8e			
f	Income from Form 8889	8f			
g	Alaska Permanent Fund dividends	8g			
h	Jury duty pay	8h			
i	Prizes and awards	8i			
j	Activity not engaged in for profit income	8j			
k	Stock options	8k			
I	Income from the rental of personal property if you engaged in the rental				
	for profit but were not in the business of renting such property	81			
m	Olympic and Paralympic medals and USOC prize money (see				
	instructions)	8m			
n	Section 951(a) inclusion (see instructions)	8n			
0	Section 951A(a) inclusion (see instructions)	80			
р	Section 461(I) excess business loss adjustment	8 p			
q	Taxable distributions from an ABLE account (see instructions)	8 q			
r	Scholarship and fellowship grants not reported on Form W-2	8r			
S	Nontaxable amount of Medicaid waiver payments included on Form				
	1040, line 1a or 1d	8s (<u>)</u>	
t	Pension or annuity from a nonqualifed deferred compensation plan or				
	a nongovernmental section 457 plan	8t		-	
u	Wages earned while incarcerated	8u			
Z	Other income. List type and amount:				
~		8z			
9	Total other income. Add lines 8a through 8z			9	10.040
<u>10</u>	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR	(, or 10	040-NK, line 8	10	-13,048.

For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule 1 (Form 1040) 2022

Par	t II Adjustments to Income					
11	Educator expenses				11	
12	Certain business expenses of reservists, performing artists, and fee	e-basi	s gov	ernment		
	officials. Attach Form 2106				12	
13	Health savings account deduction. Attach Form 8889				13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903				14	
15	Deductible part of self-employment tax. Attach Schedule SE				15	
16	Self-employed SEP, SIMPLE, and qualified plans				16	
17	Self-employed health insurance deduction				17	
18	Penalty on early withdrawal of savings				18	
19a	Alimony paid				19a	
b	Recipient's SSN	· _				
С	Date of original divorce or separation agreement (see instructions):					
20	IRA deduction				20	
21	Student loan interest deduction				21	
22	Reserved for future use				22	
23	Archer MSA deduction				23	
24	Other adjustments:					
а	Jury duty pay (see instructions)	24a				
b	Deductible expenses related to income reported on line 8I from the					
	rental of personal property engaged in for profit	24b				
С	Nontaxable amount of the value of Olympic and Paralympic medals					
	and USOC prize money reported on line 8m	24c				
d	Reforestation amortization and expenses	24d				
е	Repayment of supplemental unemployment benefits under the Trade					
	Act of 1974	24e				
f	Contributions to section 501(c)(18)(D) pension plans	24f				
g	Contributions by certain chaplains to section 403(b) plans	24g				
h	Attorney fees and court costs for actions involving certain unlawful					
	discrimination claims (see instructions)	24h				
i	Attorney fees and court costs you paid in connection with an award					
	from the IRS for information you provided that helped the IRS detect					
	tax law violations	24i				
j	Housing deduction from Form 2555	24j				
k	Excess deductions of section 67(e) expenses from Schedule K-1 (Form					
	1041)	24k				
Z	Other adjustments. List type and amount:					
		24z				
25	Total other adjustments. Add lines 24a through 24z				25	
26	Add lines 11 through 23 and 25. These are your adjustments to income	e. Ente	er here	e and on		
	Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a				26	
	BAA	REV	02/24/23 F	PRO	Schedu	le 1 (Form 1040) 2022

Additional Credits and Payments

OMB No. 1545-0074

Attach to Form 1040, 1040-SR, or 1040-NR.



Department of the Treasury Internal Revenue Service Go to www.irs.gov/Form1040 for instructions and the latest information.					Attachment Sequence No. 03
	s) shown on Form 1040, 1040-SR, or 1040-NR			cial	security number
	I THEJA JEETURI & KAVITA SHAH		353-6	7-8	3096
Par	t I Nonrefundable Credits				
1	Foreign tax credit. Attach Form 1116 if required			1	
2	Credit for child and dependent care expenses from Form 244 Form 2441			2	
3	Education credits from Form 8863, line 19		🗋	3	
4	Retirement savings contributions credit. Attach Form 8880		[4	
5	Residential energy credits. Attach Form 5695		[5	
6	Other nonrefundable credits:				
а	General business credit. Attach Form 3800	6a			
b	Credit for prior year minimum tax. Attach Form 8801	6b			
С	Adoption credit. Attach Form 8839	6c			
d	Credit for the elderly or disabled. Attach Schedule R	6d			
е	Alternative motor vehicle credit. Attach Form 8910	6e			
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f			
g	Mortgage interest credit. Attach Form 8396	6g			
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h			
i	Qualified electric vehicle credit. Attach Form 8834	6i			
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6ј			
k	Credit to holders of tax credit bonds. Attach Form 8912	6k			
Т	Amount on Form 8978, line 14. See instructions	61			
z	Other nonrefundable credits. List type and amount:				
		6z			
7	Total other nonrefundable credits. Add lines 6a through 6z		[7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040	-SR, or 104	0-NR,	_	
	line 20		•••	8	
			(cor	ntin	nued on page 2,

For Paperwork Reduction Act Notice, see your tax return instructions.

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REV 02/24/23 PRO

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Schedule 3 (Form 1040) 2022

Schedule 3 (Form 1040) 2022

Par	t II Other Payments and Refundable Credits			
9	Net premium tax credit. Attach Form 8962		9	
10	Amount paid with request for extension to file (see instructions) .		10	
11	Excess social security and tier 1 RRTA tax withheld		11	659.
12	Credit for federal tax on fuels. Attach Form 4136		12	
13	Other payments or refundable credits:			
а	Form 2439	13a		
b	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b		
С	Reserved for future use	13c		
d	Credit for repayment of amounts included in income from earlier years	13d		
е	Reserved for future use	13e		
f	Deferred amount of net 965 tax liability (see instructions)	13f		
g h	Reserved for future use	13g 13h	-	
z	Other payments or refundable credits. List type and amount:	13z		
14	Total other payments or refundable credits. Add lines 13a through	13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040 line 31		15	659.
	BAA REV	02/24/23 PRO	Schedu	le 3 (Form 1040) 2022

SCHEDULE D (Form 1040)

Capital Gains and Losses

OMB No. 1545-0074

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.

20 Attachment Sequence No. 12

Internal Revenue Service Name(s) shown on return

Department of the Treasury

RAVI THEJA JEETURI & KAVITA SHAH

Your social security number

353-67-8096

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? Yes × No If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Part I Short-Term Capital Gains and Losses – Generally Assets Held One Year or Less (see instructions)

lines This	instructions for how to figure the amounts to enter on the below. form may be easier to complete if you round off cents to le dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss f Form(s) 8949, P line 2, column	from Part I,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
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	1,807.	5,044.	1,40	01.	-1,836.
2	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					
4	Short-term gain from Form 6252 and short-term gain or (I	oss) from Forms 4	684, 6781, and 88	324	4	
5	Net short-term gain or (loss) from partnerships, Schedule(s) K-1				5	
6	Short-term capital loss carryover. Enter the amount, if an Worksheet in the instructions	y, from line 8 of y	our Capital Loss	Carryover	6	()
7	Net short-term capital gain or (loss). Combine lines 1a term capital gains or losses, go to Part II below. Otherwise	•	., .		7	-1,836.

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 lines below.		(d)	(e)	(g) Adjustmen		(h) Gain or (loss) Subtract column (e)
	form may be easier to complete if you round off cents to e dollars.	Proceeds (sales price)	Cost (or other basis)	to gain or loss Form(s) 8949, line 2, colum	Part II,	from column (d) and combine the result with column (g)
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 Box D checked	3,340.	14,491.	2,390.		-8,761.
9	Totals for all transactions reported on Form(s) 8949 with Box E checked					
10	Totals for all transactions reported on Form(s) 8949 with Box F checked.	2.	9.			-7.
11	Gain from Form 4797, Part I; long-term gain from Forms from Forms 4684, 6781, and 8824		v v	. ,	11	
12 13	Net long-term gain or (loss) from partnerships, S corporat Capital gain distributions. See the instructions	12 13				
14	Long-term capital loss carryover. Enter the amount, if any Worksheet in the instructions	14	()			
15	Net long-term capital gain or (loss). Combine lines 8a on the back	•	.,	o to Part III	15	-8,768.
For F	Paperwork Reduction Act Notice, see your tax return instruction	ons. BAA	REV 02/24/23 PRO	:	Schedu	le D (Form 1040) 2022

Part	III Summary		
16	Combine lines 7 and 15 and enter the result	16	-10,604.
	• 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 line 22.		
	• 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?		
	\square 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 you are not filing Form 4952? Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, 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.		
21	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:		
	 The loss on line 16; or (\$3,000), or if married filing separately, (\$1,500) 	21	(3,000.)
	Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?		
	☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16.		
	☑ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

REV 02/24/23 PRO

Schedule D (Form 1040) 2022

8949

Department of the Treasury

Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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



Name(s) shown on return	Social security number or taxpayer identification number
RAVI THEJA JEETURI & KAVITA SHAH	353-67-8096

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 Part I 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) (c) Date acquired		(b) (c) (d) Cost or other basis Date cognized Date sold or Proceeds See the Note below			e the Note below enter a code in column (f). See the separate instructions. Sub	Gain or (loss) Subtract column (e)	
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of (Mo., day, yr.)	(sales price) (see instructions)	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).	
ROBINHOOD SECURITIES LLC	01/01/22	12/31/22	1,807.	5,044.	W	1,401.	-1,836.	
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 C	1,807.	5,044.		1,401.	-1,836.			

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.

For Paperwork Reduction Act Notice, see your tax return instructions. BAA

Form 8949 (2022)	Attachment Sequence No.	12A	Page 2

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side RAVI THEJA JEETURI & KAVITA SHAH

Social security number or taxpayer identification number 353-67-8096

Before you check Box D, E, or F 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.

Part II Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-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 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-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.

(D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

[] (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

(F) Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property	(b) Date acquired	(c) Date sold or	(d) Proceeds	(e) Cost or other basis See the Note below	e the Note below enter a code in column (f). G See the separate instructions. Subt		(h) Gain or (loss) Subtract column (e)
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of (Mo., day, yr.)	(sales price) (see instructions)	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).
ROBINHOOD SECURITIES LLC	01/01/22	12/31/22	3,340.	14,491.	W	2,390.	-8,761.
2 Totals. Add the amounts in columns negative amounts). Enter each tota Schedule D, line 8b (if Box D above above is checked), or line 10 (if Box	3,340.	14,491.		2,390.	-8,761.		

Note: If you checked Box D 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 8949 (2022)	Attachment Sequence No.	12A	Page 2

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side RAVI THEJA JEETURI & KAVITA SHAH

Social security number or taxpayer identification number 353-67-8096

Before you check Box D, E, or F 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.

Part II Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-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 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-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.

(D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

[] (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

(F) Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property	(b) Date acquired	(c) Date sold or	(d) Proceeds	(d) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(e) If you enter an amount in columents of the note below If you enter a code in column (see the separate instruction of the note below If you enter a code in column (see the separate instruction of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in columents of the note below If you enter an amount in t	amount in column (g), ode in column (f).	(h) Gain or (loss) Subtract column (e)
(Example: 100 sh. XYZ Co.)	00 sh. XYZ Co.) (Mo., day, yr.) (Mo., day, yr.) (see instructions) in the separate		in the separate	(f) Code(s) from instructions	(g) Amount of adjustment	from column (d) and combine the result with column (g).			
ROBINHOOD SECURITIES LLC	01/01/22	12/31/22	2.	9.			-7.		
2 Totals. Add the amounts in columns negative amounts). Enter each tota Schedule D, line 8b (if Box D above above is checked), or line 10 (if Box	2.	9.			-7.				

Note: If you checked Box D 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.

SCHE (Form	DULE E	(Erom ro	Supplementa ental real estate, royalties, partners					tructo DEMICo	ata)	OMB No	0. 1545-0074
	-	(FIOIII Ie	Attach to Form 1040,		-			trusts, newios	, e.c.,	20)22
	ent of the Treasury Revenue Service		Go to www.irs.gov/ScheduleE for					formation.		Attachn Seguen	nent ce No. 13
Name(s)	shown on return								our socia	al security	
RAVI	THEJA JEE	TURI &	KAVITA SHAH					3	353-6	7-8096	
Part	I Income	or Loss	From Rental Real Estate an	d Ro	yalties						
	Note: If yo	ou are in th	e business of renting personal proper	ty, use	Schedule	e C . See	e instru	ctions. If you are	an indiv	vidual, rep	ort farm
A D			from Form 4835 on page 2, line 40. Its in 2022 that would require you	to filo	Form(c) 1	10002 0	Soo inc				
			bu file required Form(s) 1099?								_
1a	-		ch property (street, city, state, ZIF		,						
	101 HYDER	CHAND	PLAZA VADDEGERI, KURNO	DOL A	ANDHRA	PRAD	ESH	IN 518001			
<u>C</u>	Turne of Drome				ha al		_	. Dentel		-111	
1b	Type of Prope (from list below		For each rental real estate prope above, report the number of fair				Fa	ir Rental I Days	Person Da	al Use	QJV
Α	3		personal use days. Check the Q			Α		365		0	
B	5		if you meet the requirements to f	file as	a	B				0	
C			qualified joint venture. See instru	ictions	3.	C					
	of Property:	1				-	1				
	Single Family R	esidence	3 Vacation/Short-Term Ren	tal	5 Lanc	ł	7	Self-Rental			
2	Multi-Family Re	sidence	4 Commercial		6 Roya	alties	8	Other (describ	e)		
								Properties			
Incom	e.					Α		B	·-		С
3		4		3			75.				•
4				4							
Expen											
5				5							
6	-		tructions)	6							
7		-		7		2,8	16.				
8	•			8							
9				9							
10			ional fees	10							
11	Management f	ees		11		2,7	96.				
12	Mortgage inter	rest paid t	to banks, etc. (see instructions)	12							
13	Other interest			13							
14	Repairs			14			80.				
15				15		2,6	79.				
16				16							
17				17		2,9	52.				
18		xpense o	r depletion	18							
19				19		10 7					
20	•		es 5 through 19	20		13,7	23.				
21			e 3 (rents) and/or 4 (royalties). If								
			structions to find out if you must	21		-13,0	4.8				
22			state loss after limitation, if any,	21		10,0	10.				
22				22	(13,04	18	()	(Ŋ
23a		-	orted on line 3 for all rental prope				23a		/ 675.	\	
b		-	orted on line 4 for all royalty prop				23b				
c			orted on line 12 for all properties				23c				
d			orted on line 18 for all properties				23d				
e		-	orted on line 20 for all properties				23e	13,	723.		
24		-	amounts shown on line 21. Do no				· · ·		24		
25		-	ses from line 21 and rental real estat		-		Enter to	otal losses here	25	(13,048.)
26	Total rental re	eal estate	e and royalty income or (loss).	Comb	ine lines	24 and	25. E	nter the result			
	here. If Parts	II, III, IV,	and line 40 on page 2 do not	apply	to you,	also ei	nter th	is amount on			
	Schedule 1 (Fo	orm 1040)	, line 5. Otherwise, include this ar	mount			ine 41		26		-13,048.
For Pa	nerwork Reduct	ion Act No	tice, see the separate instructions.		NE	PΑ		-13,048.	Sak	adula E /E	orm 1040) 2023

Schedule E (Form 1040) 2022

SCHEDULE 8812 (Form 1040)

Department of the Treasury

Internal Revenue Service

Credits for Qualifying Children and Other Dependents

OMB No. 1545-0074

Attach to Form 1040, 1040-SR, or 1040-NF	Attach to	Form	1040,	1040-SR,	or	1040-NR.
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Go to www.irs.gov/Schedule8812 for instructions and the latest information.

20 2 2 Attachment Sequence No. 47

interna				•		
Name(s)) shown on return	Your	social s	ecurity number		
RAVI	AVI THEJA JEETURI & KAVITA SHAH 353-					
Par	t I Child Tax Credit and Credit for Other Dependents					
1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR		1	207,862.		
2a	Enter income from Puerto Rico that you excluded					
b	Enter the amounts from lines 45 and 50 of your Form 2555	0.				
c	Enter the amount from line 15 of your Form 4563 2c					
d	Add lines 2a through 2c		2d	0.		
3	Add lines 1 and 2d		3	207,862.		
4	Number of qualifying children under age 17 with the required social security number 4	2				
5	Multiply line 4 by \$2,000		5	4,000.		
6	Number of other dependents, including any qualifying children who are not under age					
	17 or who do not have the required social security number	0				
	Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resid	ent				
	alien. Also, do not include anyone you included on line 4.					
7	Multiply line 6 by \$500		7			
8	Add lines 5 and 7		8	4,000.		
9	Enter the amount shown below for your filing status.					
	• Married filing jointly—\$400,000					
	• All other filing statuses— $$200,000 \int \dots $		9	400,000.		
10	Subtract line 9 from line 3.					
	• If zero or less, enter -0					
	• If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For					
	example, if the result is \$425, enter \$1,000; if the result is $1,025$, enter \$2,000, etc. J		10	0.		
11	Multiply line 10 by 5% (0.05)		11	0.		
12	Is the amount on line 8 more than the amount on line 11?	•	12	4,000.		
	○ No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit Skip Parts II-A and II-B. Enter -0- on lines 14 and 27.	edit.				
	Yes. Subtract line 11 from line 8. Enter the result.					
13	Enter the amount from the Credit Limit Worksheet A		13	21 240		
13	Enter the smaller of line 12 or 13. This is your child tax credit and credit for other dependents.		13	31,342.		
14	Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.	·	14	4,000.		
		ol al		y anadit		
	If the amount on line 12 is more than the amount on line 14, you may be able to take the addition	iai ch	nu ta	x creatt		

on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27 (also complete Schedule 3, line 11) before completing Part II-A.

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule 8812 (Form 1040) 2022 REV 02/24/23 PRO BAA

Schedu	le 8812 (Form 1040) 2022		Page 2
Part	II-A Additional Child Tax Credit for All Filers		
Cautio	on: If you file Form 2555, you cannot claim the additional child tax credit.		
15	Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lin	e 27	🔲
16a	Subtract line 14 from line 12. If zero, stop here ; you cannot take the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27	16a	0
b 17 18a b 19	Number of qualifying children under 17 with the required social security number: x \$1,500. Enter the result. If zero, stop here; you cannot claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27 Enter -0- on line 27 . . TIP: The number of children you use for this line is the same as the number of children you used for line 4. Enter the smaller of line 16a or line 16b . Earned income (see instructions) . Is the amount on line 18a more than \$2,500?	16b 17	
20 Part	 No. Leave line 19 blank and enter -0- on line 20. Yes. Subtract \$2,500 from the amount on line 18a. Enter the result	20	Puerto Rico
Part		ts of I	Puerto Rico
21	Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, see instructions. 21		
22	Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13 .		
23	Add lines 21 and 22		
24	1040 and 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27, and Schedule 3 (Form 1040), line 11. 1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11. 24		
25	Subtract line 24 from line 23. If zero or less, enter -0	25	
26	Enter the larger of line 20 or line 25	26	
Dort	Next, enter the smaller of line 17 or line 26 on line 27.		
	II-C Additional Child Tax Credit	27	
27	This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28	27	
	BAA REV 02/24/23 PRO Sci	nedule 8	3812 (Form 1040) 2022

Form **8889** Department of the Treasury Internal Revenue Service

Health Savings Accounts (HSAs)

OMB No. 1545-0074

Attach to Form 1040, 1040-SR, or 1040-NR.

Go to www.irs.gov/Form8889 for instructions and the latest information.

	2022			
	Attachment Sequence No. 52			
umber of HSA beneficiary.				

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	L Social security numb	· · ·	A beneficiary.
,		both spouses have 353-67-8	e HSAs, s	
	re you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance C			
Part	HSA Contributions and Deduction. See the instructions before completing t	his part. If you	u are fi	ling jointly
	and both you and your spouse each have separate HSAs, complete a separat	e Part I for ea	ich spo	ouse.
1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) du See instructions	uring 2022. 	Self-or	nly 🗵 Family
2	HSA contributions you made for 2022 (or those made on your behalf), including those mu unextended due date of your tax return that were for 2022. Do not include employer con contributions through a cafeteria plan, or rollovers. See instructions	ntributions,	2	0.
3	If you were under age 55 at the end of 2022 and, on the first day of every month during were, or were considered, an eligible individual with the same coverage, enter \$3,650 (family coverage). All others , see the instructions for the amount to enter	(\$7,300 for	3	7,300.
4	Enter the amount you and your employer contributed to your Archer MSAs for 2022 from F lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during include any amount contributed to your spouse's Archer MSAs	2022, also	4	0.
5	Subtract line 4 from line 3. If zero or less, enter -0	🔤	5	7,300.
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and coverage under an HDHP at any time during 2022, see the instructions for the amount to en		6	7,300.
7	If you were age 55 or older at the end of 2022, married, and you or your spouse had family under an HDHP at any time during 2022, enter your additional contribution amount. See ins		7	
8	Add lines 6 and 7		8	7,300.
9	Employer contributions made to your HSAs for 2022 9	1,225.		· · · · ·
10	Qualified HSA funding distributions			
11	Add lines 9 and 10	1	1	1,225.
12	Subtract line 11 from line 8. If zero or less, enter -0		2	6,075.
13	HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Pa Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instruction		3	0.
Part	II HSA Distributions. If you are filing jointly and both you and your spouse each a separate Part II for each spouse.	have separa	te HSA	s, complete
14a	Total distributions you received in 2022 from all HSAs (see instructions)	14	4a	
b	Distributions included on line 14a that you rolled over to another HSA. Also include a contributions (and the earnings on those excess contributions) included on line 14a withdrawn by the due date of your return. See instructions	that were	4b	
с	Subtract line 14b from line 14a	-	4c	
15	Qualified medical expenses paid using HSA distributions (see instructions)		5	
16	Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0 Also, i amount in the total on Schedule 1 (Form 1040), Part I, line 8f	nclude this	6	
17a	If any of the distributions included on line 16 meet any of the Exceptions to the Addition Tax (see instructions), check here	al 20%		
b	Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on li are subject to the additional 20% tax. Also, include this amount in the total on Schedu 1040), Part II, line 17c	ine 16 that le 2 (Form	7b	
Part	III Income and Additional Tax for Failure To Maintain HDHP Coverage. See the completing this part. If you are filing jointly and both you and your spouse each complete a separate Part III for each spouse.	he instruction h have separa		
18	Last-month rule	1	8	
19	Qualified HSA funding distribution		9	
20	Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I,		20	
21	Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedu 1040), Part II, line 17d		21	
For Pa	perwork Reduction Act Notice, see your tax return instructions. BAA REV 02/24/	23 PRO	Fo	orm 8889 (2022)

Paid Preparer's Due Diligence Checklist OMB No. 1545-0074 Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC), For tax year Child Tax Credit (CTC) (including the Additional Child Tax Credit (ACTC) and Credit for Other Dependents (ODC)), and Head of Household (HOH) Filing Status 20 (Rev. November 2022) To be completed by preparer and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS. Attachment Department of the Treasury Sequence No. 70Go to www.irs.gov/Form8867 for instructions and the latest information. Internal Revenue Service Taxpayer name(s) shown on return Taxpayer identification number RAVI THEJA JEETURI & KAVITA SHAH 353-67-8096 Preparer's name Preparer tax identification number SYAM PRIYA RAM SAGAR GUPTA TALLAM P02082703 **Due Diligence Requirements** Part I Please check the appropriate box for the credit(s) and/or HOH filing status claimed on the return and complete the related Parts I-V □ EIC for the benefit(s) claimed (check all that apply). X CTC/ACTC/ODC ☐ HOH Yes No N/A 1 Did you complete the return based on information for the applicable tax year provided by the taxpayer or reasonably obtained by you? (See instructions if relying on prior year earned income.) × If credits are claimed on the return, did you complete the applicable EIC and/or CTC/ACTC/ODC 2 worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Schedule 8812 (Form 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instructions, or your own worksheet(s) that provides the same information, and all related forms and schedules for each credit X \square \square Did vou satisfy the knowledge requirement? To meet the knowledge requirement, you must do both of 3 the following. • Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's responses to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status. • Review information to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing X Did any information provided by the taxpayer or a third party for use in preparing the return, or 4 information reasonably known to you, appear to be incorrect, incomplete, or inconsistent? (If "Yes," X Did you make reasonable inquiries to determine the correct, complete, and consistent information? . а Did you contemporaneously document your inquiries? (Documentation should include the questions b you asked, whom you asked, when you asked, the information that was provided, and the impact the information had on your preparation of the return.) Did you satisfy the record retention requirement? To meet the record retention requirement, you must 5 keep a copy of your documentation referenced in guestion 4b, a copy of this Form 8867, a copy of any applicable worksheet(s), a record of how, when, and from whom the information used to prepare Form 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) provided by the taxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing status or to figure X List those documents provided by the taxpayer, if any, that you relied on: 6 Did you ask the taxpayer whether he/she could provide documentation to substantiate eligibility for the credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return if his/her X × 7 Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous year? . . . (If credits were disallowed or reduced, go to question 7a; if not, go to question 8.) а

8 If the taxpayer is reporting self-employment income, did you ask questions to prepare a complete and correct Schedule C (Form 1040)?

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Part	II Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go	to Part	III.)	
9a	Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.)	Yes	No	N/A
b	Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer las supported the child the entire year?			
С	Did you explain to the taxpayer the rules about claiming the EIC when a child is the qualifying child of more than one person (tiebreaker rules)?			
Part		claim C	CTC, A	CTC,
10	Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is a citizen, national, or resident of the United States?	Yes X	No	N/A
11	Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child?	X		
12	Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return?	×		
Part	Due Diligence Questions for Returns Claiming AOTC (If the return does not claim AOTC	, go to	Part \	/.)
13	Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qualified tuition and related expenses for the claimed AOTC?		Yes	No
Part	V Due Diligence Questions for Claiming HOH (If the return does not claim HOH filing statu	s, go to	o Part	VI.)
14	Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax year and provided more than half of the cost of keeping up a home for the year for a qualifying person?		Yes	No
Part	VI Eligibility Certification			
	You will have complied with all due diligence requirements for claiming the applicable credit(s) and on the return of the taxpayer identified above if you:	or HOI	H filing	status
	A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's responsion your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(status and to figure the amount(s) of the credit(s);	nses on s) and/c	the ret or HOH	urn or filing
	B. Complete this Form 8867 truthfully and accurately and complete the actions described in this checkl credit(s) claimed and HOH filing status, if claimed;	ist for a	iny app	licable
	C. Submit Form 8867 in the manner required; and			
	D. Keep all five of the following records for 3 years from the latest of the dates specified in the Form 880 Document Retention.	37 instri	uctions	under
	1. A copy of this Form 8867.			

- 2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.
- 3. Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).
- 4. A record of how, when, and from whom the information used to prepare this form and the applicable worksheet(s) was obtained.
- 5. A record of any additional information you relied upon, including questions you asked and the taxpayer's responses, to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).

If you have not complied with all due diligence requirements, you may have to pay a penalty for each failure to comply related to a claim of an applicable credit or HOH filing status (see instructions for more information).

15	Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct, and	Yes	No
	complete?	×	

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