

Review your print out for checklist items.

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due **04/18/2022**

2022 Form 1040-ES Payment Voucher 1

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the 'United States Treasury.' Write your social security number and '2022 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax you are paying by check or money order.....▶	6,014.
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REV 09/09/22 INTUIT.CG.CFP.SP

1555

736-07-2154
ARPAN KUNDU

4909 W JOSHUA BLVD APT 1051
CHANDLER AZ 85226-6020

INTERNAL REVENUE SERVICE
PO BOX 1300
CHARLOTTE NC 28201-1300

736072154 NH KUND 30 0 202212 430

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due **06/15/2022**

2022 Form 1040-ES Payment Voucher 2

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the 'United States Treasury.' Write your social security number and '2022 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax
you are paying by check
or money order.....▶

6,014.

REV 09/09/22 INTUIT.CG.CFP.SP

1555

736-07-2154
ARPAN KUNDU

4909 W JOSHUA BLVD APT 1051
CHANDLER AZ 85226-6020

INTERNAL REVENUE SERVICE
PO BOX 1300
CHARLOTTE NC 28201-1300

736072154 NH KUND 30 0 202212 430

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due **09/15/2022**

2022 Form 1040-ES Payment Voucher 3

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the 'United States Treasury.' Write your social security number and '2022 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax
you are paying by check
or money order.....▶

6,014.

REV 09/09/22 INTUIT.CG.CFP.SP

1555

736-07-2154
ARPAN KUNDU

4909 W JOSHUA BLVD APT 1051
CHANDLER AZ 85226-6020

INTERNAL REVENUE SERVICE
PO BOX 1300
CHARLOTTE NC 28201-1300

736072154 NH KUND 30 0 202212 430

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due **01/17/2023**

2022 Form 1040-ES Payment Voucher 4

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the 'United States Treasury.' Write your social security number and '2022 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax you are paying by check or money order.....▶	6,014.
--	--------

REV 09/09/22 INTUIT.CG.CFP.SP

1555

736-07-2154
ARPAN KUNDU

4909 W JOSHUA BLVD APT 1051
CHANDLER AZ 85226-6020

INTERNAL REVENUE SERVICE
PO BOX 1300
CHARLOTTE NC 28201-1300

736072154 NH KUND 30 0 202212 430

IF you live in . . .	THEN use this address to send in your payment . . .
Alabama, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Texas	Internal Revenue Service P.O. Box 1214 Charlotte, NC 28201-1214
Arkansas, Connecticut, Delaware, District of Columbia, Illinois, Indiana, Iowa, Kentucky, Maine, Maryland, Massachusetts, Minnesota, Missouri, New Hampshire, New Jersey, New York, Oklahoma, Rhode Island, Vermont, Virginia, West Virginia, Wisconsin	Internal Revenue Service P.O. Box 931000 Louisville, KY 40293-1000
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Kansas, Michigan, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oregon, Pennsylvania, South Dakota, Utah, Washington, Wyoming	Internal Revenue Service P.O. Box 802501 Cincinnati, OH 45280-2501
A foreign country, American Samoa, or Puerto Rico (or are excluding income under Internal Revenue Code 933), or use an APO or FPO address, or file Form 2555 or 4563, or are a dual-status alien or nonpermanent resident of Guam or the U.S. Virgin Islands	Internal Revenue Service P.O. Box 1303 Charlotte, NC 28201-1303

TO PAY YOUR TAXES DUE BY CHECK, MAIL THIS FORM TO THE ADDRESS LISTED BELOW.

▼ Detach Here and Mail With Your Payment and Return ▼

Department of the Treasury
Internal Revenue Service (99)

2021

Form 1040-V Payment Voucher

- ▶ Use this voucher when making a payment with Form 1040.
- ▶ Do not staple this voucher or your payment to Form 1040.
- ▶ Make your check or money order payable to the 'United States Treasury.'
- ▶ Write your social security number (SSN) on your check or money order.

Enter the amount of your payment ▶	20,099.
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REV 09/09/22 INTUIT.CG. 1555

ARPAN KUNDU
4909 W JOSHUA BLVD 1051
CHANDLER AZ 85226-6020

INTERNAL REVENUE SERVICE
P.O. BOX 802501
CINCINNATI, OH 45280-2501

736072154 NH KUND 30 0 202112 610

Filing Status [X] Single [] Married filing jointly [] Married filing separately (MFS) [] Head of household (HOH) [] Qualifying widow(er) (QW)
Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent

Your first name and middle initial: Arpan
Last name: Kundu
Your social security number: 736-07-2154
If joint return, spouse's first name and middle initial:
Last name:
Spouse's social security number:

Home address (number and street). If you have a P.O. box, see instructions.
4909 W Joshua Blvd
Apt. no.: 1051
Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.
[] You [] Spouse
City, town, or post office. If you have a foreign address, also complete spaces below.
Chandler
State: AZ
ZIP code: 852266020
Foreign country name:
Foreign province/state/county:
Foreign postal code:

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? [] Yes [X] No

Standard Deduction
Someone can claim: [] You as a dependent [] Your spouse as a dependent
[] Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: [] Were born before January 2, 1957 [] Are blind Spouse: [] Was born before January 2, 1957 [] Is blind

Table with 5 columns: (1) First name, Last name, (2) Social security number, (3) Relationship to you, (4) if qualifies for (see instructions): Child tax credit, Credit for other dependents. Includes a checkbox for 'Dependents (see instructions):'.

Main income table with columns for line numbers and amounts. Rows include: 1 Wages, salaries, tips, etc. Attach Form(s) W-2 (140,467); 2a Tax-exempt interest; 3a Qualified dividends (166); 4a IRA distributions; 5a Pensions and annuities; 6a Social security benefits; 7 Capital gain or (loss) (68,240); 8 Other income from Schedule 1, line 10 (119); 9 Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income (209,022); 10 Adjustments to income from Schedule 1, line 26; 11 Subtract line 10 from line 9. This is your adjusted gross income (209,022); 12a Standard deduction or itemized deductions (from Schedule A) (12,550); 12b Charitable contributions if you take the standard deduction (see instructions) (300); 12c Add lines 12a and 12b (12,850); 13 Qualified business income deduction from Form 8995 or Form 8995-A; 14 Add lines 12c and 13 (12,850); 15 Taxable income. Subtract line 14 from line 11. If zero or less, enter -0- (196,172).

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

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	16	42,312.															
17	Amount from Schedule 2, line 3	17																
18	Add lines 16 and 17	18	42,312.															
19	Nonrefundable child tax credit or credit for other dependents from Schedule 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	42,312.															
23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	343.															
24	Add lines 22 and 23. This is your total tax	24	42,655.															
25	Federal income tax withheld from:																	
a	Form(s) W-2	25a	22,865.															
b	Form(s) 1099	25b	0.															
c	Other forms (see instructions)	25c																
d	Add lines 25a through 25c	25d	22,865.															
26	2021 estimated tax payments and amount applied from 2020 return	26																
27a	Earned income credit (EIC)	27a																
	Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18, to claim the EIC. See instructions <input type="checkbox"/>																	
b	Nontaxable combat pay election	27b																
c	Prior year (2019) earned income	27c																
28	Refundable child tax credit or additional child tax credit from Schedule 8812	28																
29	American opportunity credit from Form 8863, line 8	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 your total other payments and refundable credits	32																
33	Add lines 25d, 26, and 32. These are your total payments	33	22,865.															
Refund	34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34																
	35a Amount of line 34 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	35a																
Direct deposit? See instructions.	b Routing number <table style="display: inline-table; border-collapse: collapse;"><tr><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td></tr></table> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		
X	X	X	X	X	X	X	X	X	X	X	X	X	X	X				
	d Account number <table style="display: inline-table; border-collapse: collapse;"><tr><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td><td style="border: 1px solid black; width: 20px; text-align: center;">X</td></tr></table>	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		
X	X	X	X	X	X	X	X	X	X	X	X	X	X	X				
	36 Amount of line 34 you want applied to your 2022 estimated tax	36																
Amount You Owe	37 Amount you owe . Subtract line 33 from line 24. For details on how to pay, see instructions	37	20,099.															
	38 Estimated tax penalty (see instructions)	38	309.															

If you have a qualifying child, attach Sch. EIC.

Third Party Designee Do you want to allow another person to discuss this return with the IRS? See instructions **Yes**. Complete below. **No**

Designee's name _____ Phone no. _____ Personal identification number (PIN) _____

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation Engineer	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)

Phone no. (330) 550-3876 Email address _____

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed
Firm's name Self-Prepared			Phone no.	
Firm's address			Firm's EIN	

**SCHEDULE 1
(Form 1040)**

Department of the Treasury
Internal Revenue Service

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

2021
Attachment
Sequence No. **01**

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

Your social security number
736-07-2154

Part 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. Attach Schedule E	5	
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling income	8b	
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Taxable Health Savings Account distribution	8e	
f	Alaska Permanent Fund dividends	8f	
g	Jury duty pay	8g	
h	Prizes and awards	8h	
i	Activity not engaged in for profit income	8i	
j	Stock options	8j	
k	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	8k	
l	Olympic and Paralympic medals and USOC prize money (see instructions)	8l	
m	Section 951(a) inclusion (see instructions)	8m	
n	Section 951A(a) inclusion (see instructions)	8n	
o	Section 461(l) excess business loss adjustment	8o	
p	Taxable distributions from an ABLE account (see instructions)	8p	
z	Other income. List type and amount ▶ _____	8z	
	Substitute Payment from 1099-Misc 119.		119.
9	Total other income. Add lines 8a through 8z	9	119.
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	119.

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

Schedule 1 (Form 1040) 2021

Part II Adjustments to Income

11	Educator expenses		11	
12	Certain business expenses of reservists, performing artists, and fee-basis government 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	▶ _____		
c	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:			
a	Jury duty pay (see instructions)	24a		
b	Deductible expenses related to income reported on line 8k from the rental of personal property engaged in for profit	24b		
c	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8l	24c		
d	Reforestation amortization and expenses	24d		
e	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 . Enter here and on Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a		26	

**SCHEDULE 2
(Form 1040)**

Department of the Treasury
Internal Revenue Service

Additional Taxes

▶ **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

2021
Attachment
Sequence No. **02**

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

Your social security number
736-07-2154

Part I Tax

1	Alternative minimum tax. Attach Form 6251	1	
2	Excess advance premium tax credit repayment. Attach Form 8962	2	
3	Add lines 1 and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17	3	

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required	8	
9	Household employment taxes. Attach Schedule H	9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10	
11	Additional Medicare Tax. Attach Form 8959	11	
12	Net investment income tax. Attach Form 8960	12	343 .
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

Part II Other Taxes *(continued)*

17	Other additional taxes:		
a	Recapture of other credits. List type, form number, and amount ► _____	17a	
b	Recapture of federal mortgage subsidy. If you sold your home in 2021, see instructions	17b	
c	Additional tax on HSA distributions. Attach Form 8889	17c	
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17d	
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e	
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f	
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g	
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h	
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i	
j	Section 72(m)(5) excess benefits tax	17j	
k	Golden parachute payments	17k	
l	Tax on accumulation distribution of trusts	17l	
m	Excise tax on insider stock compensation from an expatriated corporation	17m	
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n	
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o	
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p	
q	Any interest from Form 8621, line 24	17q	
z	Any other taxes. List type and amount ► _____	17z	
18	Total additional taxes. Add lines 17a through 17z		18
19	Additional tax from Schedule 8812		19
20	Section 965 net tax liability installment from Form 965-A	20	
21	Add lines 4, 7 through 16, 18, and 19. These are your total other taxes . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		21
			343.

SCHEDULE D
(Form 1040)

Capital Gains and Losses

OMB No. 1545-0074

2021

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

Arpan Kundu

Your social security number

736-07-2154

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)

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(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	261,890.	205,960.		55,930.
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	111,473.	109,397.	2,077.	4,153.
2 Totals for all transactions reported on Form(s) 8949 with Box B checked	2,865.	11.		2,854.
3 Totals for all transactions reported on Form(s) 8949 with Box C checked	11,637.	13,757.		-2,120.
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back				7 60,817.

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.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) 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	18,498.	11,075.		7,423.
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
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				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions. See the instructions				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on the back				15 7,423.

Part III Summary

<p>16 Combine lines 7 and 15 and enter the result</p> <ul style="list-style-type: none"> • 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. 	16	68,240.
<p>17 Are lines 15 and 16 both gains?</p> <p><input checked="" type="checkbox"/> Yes. Go to line 18.</p> <p><input type="checkbox"/> No. Skip lines 18 through 21, and go to line 22.</p>		
<p>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 ▶</p>	18	
<p>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 ▶</p>	19	
<p>20 Are lines 18 and 19 both zero or blank and are you not filing Form 4952?</p> <p><input checked="" type="checkbox"/> 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.</p> <p><input type="checkbox"/> No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.</p>		
<p>21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:</p> <ul style="list-style-type: none"> • The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500) } <p>Note: When figuring which amount is smaller, treat both amounts as positive numbers.</p>	21	()
<p>22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?</p> <p><input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 16.</p> <p><input type="checkbox"/> No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.</p>		

Sales and Other Dispositions of Capital Assets

Department of the Treasury
Internal Revenue Service

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Name(s) shown on return

Arpan Kundu

Social security number or taxpayer identification number

736-07-2154

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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.

- (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 (Example: 100 sh. XYZ Co.)	(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 and see <i>Column (e)</i> in the separate instructions	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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)	
						(f) Code(s) from instructions	(g) Amount of adjustment		
	86887Q109 SURO CAPITAL CORP 100	09/30/20	01/06/21	1,334.	1,187.			147.	
	76156B107 REVOLVE GROUP INC A 200	08/03/20	01/08/21	6,688.	3,300.			3,388.	
	655664100 NORDSTROM INC 100	09/30/20	01/08/21	3,249.	1,207.			2,042.	
	881608103 TESORO ENTERPRISES INC 100	12/07/20	01/11/21	17.	29.	W	12.	0.	
	CALL UPWORK INC \$40 EX P 01/15/21 1	01/15/21	01/15/21	39.	0.			39.	
	CALL PALANTIR TECHS \$30 EXP 01/15/21 INC CL A 3	01/15/21	01/15/21	72.	0.			72.	
	Y7542C130 SCORPIO TANKERS INC NEW 500	07/07/20	01/25/21	5,966.	6,750.			-784.	
	76156B107 REVOLVE GROUP INC A 15	09/18/20	01/25/21	565.	257.			308.	
	687033100 OROCO RESOURCE CORP 1000	12/04/20	01/25/21	1,482.	1,520.			-38.	
	08862E109 BEYOND MEAT INC 25	VARIOUS	01/25/21	4,002.	3,144.			858.	
	86887Q109 SURO CAPITAL CORP 105	VARIOUS	01/25/21	1,593.	1,275.			318.	
	Y7542C130 SCORPIO TANKERS INC NEW 89	07/07/20	01/26/21	1,094.	1,202.			-108.	
	Y7542C130 SCORPIO TANKERS INC NEW 200	VARIOUS	01/27/21	2,460.	2,611.			-151.	
	CALL SCORPIO TANKERS INC \$15 EXP 02/19/21 NEW 6	01/27/21	01/28/21	-24.	0.			-24.	
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				28,537.	22,482.		12.	6,067.

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Sales and Other Dispositions of Capital Assets

Department of the Treasury
Internal Revenue Service

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Arpan Kundu

Social security number or taxpayer identification number

736-07-2154

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- (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 (Example: 100 sh. XYZ Co.)	(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 and see <i>Column (e)</i> in the separate instructions	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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)	
						(f) Code(s) from instructions	(g) Amount of adjustment		
	Y7542C130 SCORPIO TANKERS INC NEW 200	VARIOUS	02/18/21	3,174.	2,194.			980.	
	Y7542C130 SCORPIO TANKERS INC NEW 400	VARIOUS	02/19/21	6,104.	4,362.			1,742.	
	Y7542C130 SCORPIO TANKERS INC NEW 100	10/19/20	03/04/21	1,594.	1,067.			527.	
	Y7542C130 SCORPIO TANKERS INC NEW 50	VARIOUS	03/29/21	918.	531.			387.	
	65343B104 NEXTECH AR SOLUTIONS 240	VARIOUS	03/30/21	818.	1,351.			-533.	
	Y7542C130 SCORPIO TANKERS INC NEW 51	VARIOUS	03/30/21	963.	577.			386.	
	91688F104 UPWORK INC 50	08/13/20	04/14/21	2,457.	719.			1,738.	
	91688F104 UPWORK INC 100	VARIOUS	04/16/21	4,950.	1,451.			3,499.	
	65343B104 NEXTECH AR SOLUTIONS 1000	VARIOUS	05/17/21	1,991.	5,554.			-3,563.	
	69608A108 PALANTIR TECHS INC A 315	VARIOUS	05/20/21	6,442.	4,274.			2,168.	
	65343B104 NEXTECH AR SOLUTIONS 1000	VARIOUS	06/11/21	2,780.	5,085.			-2,305.	
	65343B104 NEXTECH AR SOLUTIONS 2500	VARIOUS	06/15/21	7,150.	12,753.			-5,603.	
	18452B209 CLEANSARK INC NEW 120	06/15/21	09/09/21	1,616.	2,296.			-680.	
	34986W106 FORWARDLY INC 37080	VARIOUS	11/19/21	3,708.	9,532.			-5,824.	
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				44,665.	51,746.			-7,081.

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Sales and Other Dispositions of Capital Assets

Department of the Treasury
Internal Revenue Service

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Name(s) shown on return
Arpan Kundu

Social security number or taxpayer identification number
736-07-2154

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- (C) Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(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 and see <i>Column (e)</i> in the separate instructions	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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	INTEL CORP 23	05/01/20	03/15/21	1,441.	1.			1,440.
	INTEL CORP 25	05/03/21	05/05/21	1,424.	10.			1,414.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				2,865.	11.			2,854.

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1	(a) Description of property (Example: 100 sh. XYZ Co.)	(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 and see <i>Column (e)</i> in the separate instructions	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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	3121.55 of DGB	01/09/21	09/03/21	207.	100.			107.
	16878.45 of DGB	01/09/21	09/03/21	1,121.	553.			568.
	13654.53 of DGB	01/09/21	09/12/21	773.	447.			326.
	10488.25 of DGB	02/05/21	09/12/21	594.	400.			194.
	2488.08 of DGB	02/05/21	09/12/21	141.	100.			41.
	11017.00 of DGB	02/08/21	09/12/21	624.	500.			124.
	4837.29 of DGB	02/08/21	09/12/21	274.	250.			24.
	2514.85 of DGB	02/08/21	09/12/21	142.	131.			11.
	200.00 of DGB	02/08/21	10/08/21	10.	10.			0.
	2085.30 of DGB	02/08/21	10/14/21	100.	109.			-9.
	7634.97 of DGB	02/12/21	10/14/21	365.	500.			-135.
	8964.29 of DGB	02/14/21	10/14/21	429.	500.			-71.
	2969.63 of DGB	02/15/21	10/14/21	142.	250.			-108.
	12863.03 of DGB	02/15/21	10/14/21	616.	1,100.			-484.
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►			5,538.	4,950.			588.

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- (C) Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(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 and see <i>Column (e)</i> in the separate instructions	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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	1169.24 of DGB	02/15/21	10/14/21	56.	100.			-44.
	6281.88 of DGB	02/21/21	10/14/21	301.	500.			-199.
	9338.48 of DGB	02/27/21	10/14/21	447.	500.			-53.
	9449.61 of DGB	02/27/21	10/14/21	452.	500.			-48.
	3948.47 of DGB	02/28/21	10/14/21	189.	200.			-11.
	1317.92 of DGB	03/20/21	10/14/21	63.	100.			-37.
	1322.93 of DGB	03/20/21	10/14/21	63.	100.			-37.
	6750.58 of DGB	03/20/21	10/14/21	323.	500.			-177.
	6863.26 of DGB	03/21/21	10/14/21	328.	500.			-172.
	6848.42 of DGB	03/21/21	10/14/21	328.	500.			-172.
	7250.78 of DGB	03/22/21	10/14/21	347.	500.			-153.
	4941.19 of DGB	03/25/21	10/14/21	236.	307.			-71.
	368324.10 of SHIB	10/08/21	10/27/21	31.	10.			21.
	3110.14 of DGB	03/25/21	11/10/21	183.	193.			-10.
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►			3,347.	4,510.			-1,163.

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						(f) Code(s) from instructions	(g) Amount of adjustment	
	5543.85 of DGB	04/04/21	11/10/21	325.	500.			-175.
	1693.82 of DGB	04/14/21	11/10/21	99.	200.			-101.
	2582.63 of DGB	04/14/21	11/10/21	152.	300.			-148.
	3036.87 of DGB	04/15/21	11/10/21	178.	300.			-122.
	2022.95 of DGB	04/15/21	11/10/21	119.	200.			-81.
	4190.41 of DGB	04/17/21	11/10/21	246.	500.			-254.
	2939.09 of DGB	04/24/21	11/10/21	172.	350.			-178.
	1562.52 of DGB	04/28/21	11/10/21	92.	200.			-108.
	2263.62 of DGB	05/15/21	11/10/21	133.	250.			-117.
	2840.56 of DGB	05/16/21	11/10/21	167.	300.			-133.
	1940.87 of DGB	05/18/21	11/10/21	114.	200.			-86.
	1557.03 of DGB	05/18/21	11/10/21	91.	150.			-59.
	1682.54 of DGB	05/19/21	11/10/21	99.	150.			-51.
	11247.78 of DGB	05/23/21	11/10/21	660.	600.			60.
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►			2,647.	4,200.			-1,553.

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► 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

Arpan Kundu

Social security number or taxpayer identification number

736-07-2154

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.

Part I 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.

- (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 (Example: 100 sh. XYZ Co.)	(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 and see <i>Column (e)</i> in the separate instructions	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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	1785.31 of DGB	06/12/21	11/10/21	105.	97.			8.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				105.	97.			8.

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.

**Net Investment Income Tax—
Individuals, Estates, and Trusts**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form8960 for instructions and the latest information.

Name(s) shown on your tax return
Arpan Kundu

Your social security number or EIN
736-07-2154

- Part I Investment Income** Section 6013(g) election (see instructions)
 Section 6013(h) election (see instructions)
 Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions)		1	
2	Ordinary dividends (see instructions)		2	196.
3	Annuities (see instructions)		3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a		
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b		
c	Combine lines 4a and 4b		4c	
5a	Net gain or loss from disposition of property (see instructions)	5a	68,240.	
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b		
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c		
d	Combine lines 5a through 5c		5d	68,240.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)		6	
7	Other modifications to investment income (see instructions)		7	119.
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7		8	68,555.

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see instructions)	9a		
b	State, local, and foreign income tax (see instructions)	9b		
c	Miscellaneous investment expenses (see instructions)	9c		
d	Add lines 9a, 9b, and 9c		9d	
10	Additional modifications (see instructions)		10	
11	Total deductions and modifications. Add lines 9d and 10		11	

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13–17. Estates and trusts, complete lines 18a–21. If zero or less, enter -0-		12	68,555.
13	Modified adjusted gross income (see instructions)	13	209,022.	
14	Threshold based on filing status (see instructions)	14	200,000.	
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	9,022.	
16	Enter the smaller of line 12 or line 15		16	9,022.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). Enter here and include on your tax return (see instructions)		17	343.
18a	Net investment income (line 12 above)	18a		
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b		
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-	18c		
19a	Adjusted gross income (see instructions)	19a		
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b		
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c		
20	Enter the smaller of line 18c or line 19c		20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions)		21	

Tax History Report

2021

▶ Keep for your records

Name(s) Shown on Return

Arpan Kundu

Five Year Tax History:					
	2017	2018	2019	2020	2021
Filing status		Single	Single	Single	Single
Total income		56,414.	122,795.	222,333.	209,022.
Adjustments to income					
Adjusted gross income		56,414.	122,795.	222,333.	209,022.
Tax expense		4,419.	9,352.	7,192.	9,445.
Interest expense . . .					
Contributions					
Misc. deductions . . .					
Other itemized ded'ns					
Total itemized/ standard deduction . .		12,000.	12,200.	12,400.	12,850.
Exemption amount . .		0.	0.	0.	0.
QBI deduction			7.	1.	
Taxable income		44,414.	110,588.	209,932.	196,172.
Tax		5,713.	20,477.	47,323.	42,312.
Alternative min tax . .					
Total credits			1.		
Other taxes		0.		849.	343.
Payments		10,021.	22,609.	25,807.	22,865.
Form 2210 penalty . .					309.
Amount owed				22,365.	20,099.
Applied to next year's estimated tax .					
Refund		4,308.	2,133.		
Effective tax rate % . .		10.13	16.67	21.28	20.24
**Tax bracket %		22.0	24.0	35.0	32.0

**Tax bracket % is based on Taxable income.

IMPORTANT DISCLOSURES

If you are owed federal tax refund(s), you have a right to choose how you will receive the refund(s). There are several options available to you. Some options cost money and some options are free. Please read about these options below.

You can file your federal tax return(s) electronically or by paper and obtain your federal tax refund(s) directly from the Internal Revenue Service ("IRS") for free. If you file your tax return(s) electronically, you can receive refund checks directly from the IRS through the U.S. Postal Service in 21 to 28 days from the time you file your tax return(s) or the IRS can deposit your refund(s) directly into your bank account in less than 21 days from the time you file your tax return(s) unless there are delays by the IRS. If you file a paper return through the U.S. Postal Service, you can receive refund checks directly from the IRS through the U.S. Postal Service in 6 to 8 weeks from the time the IRS receives your return(s) or the IRS can deposit your refund(s) directly into your bank account in 6 to 8 weeks from the time the IRS receives your return(s). However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2022.

You can file your federal tax return(s) electronically, select the Refund Processing Service ("RPS") for an additional fee of \$39.00 (the "RPS fee"), and have your federal tax refund(s) processed through a processor using banking services of a financial institution. The RPS allows your refund(s) to be deposited into a bank account at Green Dot Bank ("Bank") and deducts your TurboTax fees and other amounts that you authorize from your federal refund(s). The balance of your federal refund(s) is delivered to you via the disbursement method you select. If you file your tax return(s) electronically and select the RPS, the IRS will deposit your refund(s) with Bank. Upon Bank's receipt of your refund(s), Santa Barbara Tax Products Group, LLC, a division of Green Dot Corporation, a Delaware corporation, a processor, will deduct from your federal refund(s) the RPS fee, any fees charged by TurboTax for the preparation and filing of your tax return(s) and any other amounts authorized by you and disburse the balance of your refund proceeds to you. Unless there are unexpected delays, federal refunds are received in less than 21 days from the time you file your tax return(s) electronically. However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2022.

The RPS is not necessary to obtain your refund(s). If you have an existing bank account, you do not need to use the RPS, which requires the payment of a fee, in order to receive a direct deposit from the IRS. You may consult the IRS website (IRS.gov) for information about tax refund processing.

If you select the RPS, no prior debt you may owe to Bank will be deducted from your refund(s).

You can change your income tax withholdings which might result in you receiving additional funds throughout the year rather than waiting to receive these funds potentially in tax refund(s) next year. Please consult your employer or tax advisor for additional details.

This Agreement requires all disputes to be resolved by way of binding arbitration. The terms of the arbitration provision appear in Section 11.

Information regarding low-cost deposit accounts may be available at www.mymoney.gov

The chart below shows the options for filing your federal tax returns (e-file or paper returns), the RPS product, refund disbursement options, estimated timing for obtaining your federal tax refund proceeds, and costs associated with the various options.

WHAT TYPE OF FILING METHOD?	WHAT ARE YOUR DISBURSEMENT OPTIONS?	WHAT IS THE ESTIMATED TIME TO RECEIVE REFUND(S)?	WHAT COSTS DO YOU INCUR IN ADDITION TO TAX PREPARATION FEES?
PAPER RETURN No Refund Processing Service	IRS direct deposit to your personal bank account.	Approximately 6 to 8 weeks ¹	No additional cost.
	Check mailed by IRS to address on tax return(s).	Approximately 6 to 8 weeks ¹	
ELECTRONIC FILING (E-FILE) No Refund Processing Service	IRS direct deposit to your personal bank account.	Usually within 21 days ¹	No additional cost.
	Check mailed by IRS to address on tax return(s).	Approximately 21 to 28 days ¹	
ELECTRONIC FILING (E-FILE) Refund Processing Service	Direct deposit to your personal bank account.	Usually within 21 days ¹	\$ 39 . 00 ²

¹You may experience delays with your tax refund(s) if, for example, you enter incorrect bank account or contact information, you enter a bank account in someone else's name, or if possible suspicious activity is detected. If your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2022.

²The charges here consist of an RPS Fee, a TurboTax fee and any fees for additional products and services purchased. See Section 3 of the Refund Processing Service Agreement for the cost of the service you have chosen.

Questions? Call 877-908-7228

We need your consent to process with this payment option

This is an IRS requirement

The purpose of this agreement is to confirm that you are eligible for this payment option. By agreeing, you allow Intuit, the maker of TurboTax software, to verify that your refund is enough to cover total fees and applicable sales tax and to evaluate your current and future eligibility for the Refund Processing Service.

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. You specify that your consent is valid for three years from the date of this signature."

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) at <https://www.treasury.gov/tigta/>.

To agree, enter your name(s) and date in the boxes below and select the "I Agree" button on the bottom of the page.

I authorize Intuit, the maker of TurboTax, to use the information provided in this 2021 return to determine whether a portion of the refund can be used to pay my fees and to evaluate my current and future eligibility for the Refund Processing Service.

Arpan
First Name

Kundu
Last Name

Please type the date below:

03 / 22 / 2022

Date

FORM 1040 or FORM 1040-SR WORKSHEET
NOTE: Form 1040, 1040-SR and Schedules 1 - 3 are fully calculated.

2021

Use this worksheet to enter all data which will flow to the Form 1040 or Form 1040SR and Schedules 1- 3.
 Use these QuickZooms to jump to the entry sections for Schedules 1- 3 on this Worksheet:

Form 1040 or Form 1040SR Worksheet Navigation QuickZooms

- QuickZoom** to Schedule 1 — Additional Income and Adjustments to Income ▶ _____
QuickZoom to Schedule 2 — Additional Taxes ▶ _____
QuickZoom to Schedule 3 — Additional Credits and Payments ▶ _____

Form 1040 or Form 1040-SR — Personal Info, Filing Status, Dependent Info

For the year January 1 - December 31, 2021, or other tax year
 beginning _____, 2021, ending _____, 20 ____.

Your First Name	MI	Last Name	Your Social Security No.
<u>Arpan</u>		<u>Kundu</u>	<u>736-07-2154</u>
If Joint Return, Spouse's First Name	MI	Last Name	Spouse's Social Security No.
Home Address (No. and Street). If You Have a P.O. Box, See Instructions.			Apt. No.
<u>4909 W Joshua Blvd</u>			<u>1051</u>
City, Town or Post Office. If you have a foreign address, also complete below. State			ZIP Code
<u>Chandler</u> <u>AZ</u>			<u>85226-6020</u>
Foreign country name		Foreign province/state/county	Foreign postal code

QuickZoom to explanation statement for overseas extension ▶

Presidential Election Campaign

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund.
 Checking a box will not change your tax or refund. **You** **Spouse**

At any time during 2021, did you receive, sell, exchange, or otherwise
 dispose of any financial interest in any virtual currency? **Yes** **No**

Filing Status Check only one box.
 All entries for filing status and dependents should be made on the Federal Information Worksheet.

- Single
 Married filing jointly (even if only one had income)
 Married filing separately. Enter spouse's SSN above and full name here.
 Head of household (with qualifying person). (See instructions) If the qualifying person is a child
 but not your dependent, enter the child's name here. ▶ _____
 Qualifying widow(er) (See instructions)

Dependents If more than four dependents, see instructions and check here ▶

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for: under age 18 qualifying for child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

- QuickZoom** to the Federal Information Worksheet
QuickZoom to the Dependent and Nondependent Information Worksheet . . .

Standard Deduction

Someone can claim you as a dependent
 Someone can claim your spouse as a dependent

a Check if: You were born before January 2, 1957 Blind
 Spouse was born before January 2, 1957 Blind
Total boxes checked ▶ **a** _____

b If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ **b**

QuickZoom to required PPP loan forgiveness statement to report tax-exempt income ▶ _____

Form 1040 or Form 1040-SR, Lines 1 - 7

1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	140,467.
2 a	Tax-exempt interest 2a _____		
b	Taxable interest 2b _____	2b	
3 a	Qualified dividends 3a 166.		
b	Ordinary dividends 3b _____	3b	196.
4 a	IRA distributions 4a _____		
b	Taxable amount 4b _____	4b	
5 a	Pensions and annuities 5a _____		
b	Taxable amount 5b _____	5b	
6 a	Social security benefits 6a _____		
b	Taxable amount 6b _____	6b	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here. ▶ <input type="checkbox"/>	7	68,240.

QuickZoom to Schedule 1 — Additional Income and Adjustments to Income ▶ _____

Form 1040 or Form 1040-SR, Lines 8 - 11

8	Other income from Schedule 1, line 10.	8	119.
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income ▶	9	209,022.
10	Adjustments to income from Schedule 1, line 26 ▶	10	
11	Subtract line 10 from line 9. This is your adjusted gross income ▶	11	209,022.
	AGI including excludable Puerto Rico Income		209,022.

Form 1040 or Form 1040-SR, Line 12 — Standard or Itemized Deduction

12 Standard deduction or itemized deductions (from Schedule A)

Standard Deduction for —

- People who checked blind or over 65 or who can be claimed as a dependent, see instructions.
- All others:
 - Single or Married filing separately: \$12,550
 - Married filing jointly or Qualifying widow(er): \$25,100
 - Head of household: \$18,800
 - If you checked any box under *Standard Deduction*, see instructions.

QuickZoom to the Standard Deduction Worksheet. _____

a **Itemized deductions** (from Schedule A) or your **standard deduction**, see above **12 a** | 12,550.

Enter the smaller of these cash contributions made or \$300 (\$600 if married filing jointly) on line 12b below if you take the standard deduction 300.

b Charitable contributions if you take the standard deduction. **12 b** | 300.

c Add lines 12a and 12b. **12 c** | 12,850.

Subtract itemized or standard deduction from adjusted gross income amount 196,172.

Form 1040 or Form 1040-SR, Lines 13 - 18			
13	Qualified business income deduction from Form 8995 or Form 8995-A	13	
14	Add lines 12c and 13	14	12,850.
15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	15	196,172.
16	Tax. Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>		
17	Amount from Schedule 2, line 3.	17	42,312.
18	Add lines 16 and 17	18	42,312.
QuickZoom to Schedule 2 — Additional Tax section ▶ _____			

Form 1040 or Form 1040-SR, Line 19 - 24			
19	Nonrefundable child tax credit or credit for other dependents from Schedule 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	42,312.
23	Other taxes, including self-employment tax, from Schedule 2, line 21.	23	343.
24	Add lines 22 and 23. This is your total tax ▶	24	42,655.
QuickZoom to Schedule 3 — Additional Credits and Payments ▶ _____			

Form 1040 or Form 1040-SR, Lines 25 - 33			
25	Federal income tax withheld from:		
a	Form(s) W-2	25 a	22,865.
b	Form(s) 1099	25 b	0.
c	Other forms	25 c	
d	Add lines 25a through 25c.	25 d	22,865.
26	2021 estimated tax payments and amount applied from 2020 return	26	
27	If you have a qualifying child, attach Sch. EIC.		
a	Earned income credit (EIC) Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18, to claim the EIC. ▶ <input type="checkbox"/>	27 a	
b	Nontaxable combat pay election	27 b	
c	Prior year (2019) earned income	27 c	
28	Refundable child tax credit or additional child tax credit from Schedule 8812	28	
29	American opportunity credit from Form 8863, line 8.	29	
30	Recovery rebate credit.	30	
31	Amount from Schedule 3, line 15	31	
32	Add lines 27a and 28 through 31. These are your other payments and refundable credits ▶	32	
33	Add Lines 25d, 26, and 32. These are your total payments ▶	33	22,865.
QuickZoom to Schedule EIC Worksheet, pg. 2 if credit is not calculated. ▶ _____			
QuickZoom to "due diligence checklist" substitute for Form 8867. ▶ _____			
QuickZoom to Schedule 3 — Additional Credits and Payments ▶ _____			

Form 1040 or Form 1040-SR, Lines 34 - 36

Refund:			
34	If total Payments is more than total tax, subtract total tax from payments . This is the amount you overpaid	34	
35 a	Amount of overpayment you want refunded to you . If Form 8888 is attached, check here. <input type="checkbox"/>	35	
Direct deposit?			
▶ b Routing number <u>XXXXXXXXXX</u>			
▶ c Type:			
<input type="checkbox"/> Checking			
<input type="checkbox"/> Savings			
▶ d Account number <u>XXXXXXXXXXXXXXXXXXXX</u>			
36	Amount of overpayment on line 34 you want applied to your 2022 estimated tax ▶	36	

Form 1040 or Form 1040-SR, Lines 37 and 38

Amount You Owe:			
37	Subtract total payments from total tax ▶	37	20,099.
Note: Schedule H and Schedule E SE filers, line 37 may not represent all of the taxes you owe for 2021. See Schedule 3, line 12e, and its instructions for details.			
38	Estimated tax penalty ▶	38	309.

QuickZoom to Late Penalties and Interest Worksheet ▶ QuickZoom. . . ▶

Schedule 1 – Additional Income and Adjustments to Income

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes.	1	
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Alimony Received Smart Worksheet

A	Taxpayer	Spouse	Date of divorce/sep	*
B				<input type="checkbox"/>

* Check the box if the pre-2019 decree was modified after 2018 to treat the payments as nontaxable

2 a	Alimony received. . . . Taxpayer _____ Spouse _____	2 a	
b	Date of original divorce or separation agreement ▶		
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. Attach Schedule E	5	
6	Farm income or (loss). Attach Schedule F.	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8 a	
b	Gambling income	8 b	
c	Cancellation of debt	8 c	
d	Foreign earned income exclusion from Form 2555	8 d	
e	Taxable Health Savings Account distribution	8 e	
f	Alaska Permanent Fund dividends	8 f	
g	Jury duty pay	8 g	
h	Prizes and awards	8 h	
i	Activity not engaged in for profit income	8 i	
j	Stock options.	8 j	
k	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	8 k	
l	Olympic and Paralympic medals and USOC prize money	8 l	
m	Section 951(a) inclusion.	8 m	
n	Section 951A(a) inclusion.	8 n	
o	Section 461(l) excess business loss adjustment	8 o	
p	Taxable distributions from an ABL account	8 p	
z	Other income. List type and amount: Substitute Payment from 1099-Misc <u>119.</u>	8 z	119.
9	Total other income. Add lines 8a through 8z	9	119.
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8.	10	119.
Total Income. Combine Form 1040 lines 1- 7 and Schedule 1, line 10, enter on Form 1040, line 9. ▶			209,022.

Quickzoom to 1040 Worksheet, line 9 – Total Income ▶ QuickZoom. . . ▶

Part II Adjustments to Income

Table with 3 columns: Line number, Description, and Amount. Rows include Educator expenses, Certain business expenses of reservists, Health savings account deduction, Moving expenses for members of the Armed Forces, Deductible part of self-employment tax, Self-employed SEP, SIMPLE, and qualified plans, Self-employed health insurance deduction, and Penalty on early withdrawal of savings.

Alimony Paid Smart Worksheet

Form with fields for Recipient's name, Recipient's SSN, Date of divorce/sep, and Alimony paid. Includes a checkbox for non-deductible payments and a note: '* Check the box if the pre-2019 decree was modified after 2018 to treat the payments as nondeductible'.

Table with 3 columns: Line number, Description, and Amount. Rows include Alimony paid, Recipient's SSN, Date of original divorce or separation agreement, IRA deduction, Student loan interest deduction, Reserved for future use, Archer MSA deduction, Other adjustments (a-z), Total other adjustments, and Adjustments to income.

Schedule 2 - Additional Taxes

Part I Tax

Table with 3 columns: Line number, Description, and Amount. Rows include Alternative minimum tax, Excess advance premium tax credit repayment, and Total tax.

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE		4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5		
6	Uncollected social security and Medicare tax on wages. Attach Form 8919.	6		
7	Total additional social security and Medicare tax. Add lines 5 and 6		7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required		8	
9	Household employment taxes from Schedule H		9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required		10	
11	Additional Medicare Tax. Attach Form 8959		11	
12	Net investment income tax. Attach Form 8960		12	343.
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from W-2, box 12.		13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares		14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000.		15	
16	Recapture of low-income housing credit. Attach Form 8611		16	
17	Other additional taxes:			
	a Recapture of other credits. List type, form number, and amount: ▶ _____	17 a		
	b Recapture of federal mortgage subsidy. If you sold your home in 2021, see instructions	17 b		
	c Additional tax on HSA distributions. Attach Form 8889	17 c		
	d Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17 d		
	e Additional tax on Archer MSA distributions. Attach Form 8853	17 e		
	f Additional tax on Medicare Advantage MSA distributions. Attach Form 8853.	17 f		
	g Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17 g		
	h Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17 h		
	i Compensation you received from a nonqualified deferred compensation plan described in section 457A	17 i		
	j Section 72(m)(5) excess benefits tax	17 j		
	k Golden parachute payments	17 k		
	l Tax on accumulation distribution of trusts	17 l		
	m Excise tax on insider stock compensation from an expatriated corporation	17 m		
	n Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17 n		
	o Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17 o		
	p Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17 p		
	q Any interest from Form 8621, line 24.	17 q		
	z Any other taxes. List type and amount: ▶ _____	17 z		
18	Total additional taxes. Add lines 17a through 17z.		18	
19	Additional tax from Schedule 8812		19	
20	Section 965 net tax liability installment from Form 965-A.	20		
21	Add lines 4, 7 through 16, 18, and 19. These are your total other taxes . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		21	343.
	Total tax (add line 21 and Schedule 3, line 7b)			42,655.

Schedule 3 – Additional Credits and Payments

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required		1	
2	Credit for child and dependent care expenses from Form 2441, line 11.			
2	Attach Form 2441		2	
3	Education credits from Form 8863, line 19		3	
4	Retirement savings contributions credit. Attach Form 8880		4	
5	Residential Energy Credit. Attach Form 5695		5	
6	Other nonrefundable credits:			
a	General business credit. Attach Form 3800	6 a		
b	Credit for prior year minimum tax. Attach Form 8801	6 b		
c	Adoption credit. Attach Form 8839	6 c		
d	Credit for the elderly or disabled. Attach Schedule R	6 d		
e	Alternative motor vehicle credit. Attach Form 8910	6 e		
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6 f		
g	Mortgage interest credit. Attach Form 8396	6 g		
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6 h		
i	Qualified electric vehicle credit. Attach Form 8834	6 i		
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6 j		
k	Credit to holders of tax credit bonds. Attach Form 8912	6 k		
l	Amount on Form 8978, line 14	6 l		
z	Other nonrefundable credits. List type and amount: ▶ _____	6 z		
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 1040-NR, line 20		8	
a	Add line 8 plus child tax/other dep. credit on line 19 above			
b	Subtract total credits on line 8a from tax on line 18 above			42,312.

Quickzoom to 1040 Worksheet, line 24 – Total Tax ▶ QuickZoom. . . ▶ _____

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962		9	
10	Amount paid with request for extension to file		10	
11	Excess social security and tier 1 RRTA tax withheld		11	
12	Credit for federal tax on fuels. Attach Form 4136		12	
13	Other payments or refundable credits:			
a	Form 2439	13 a		
b	Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken before April 1, 2021	13 b		
c	Health coverage tax credit from Form 8885	13 c		
d	Credit for repayment of amounts included in income from earlier years	13 d		
e	Reserved for future use	13 e		
f		13 f		
g	Credit for child and dependent care expenses from Form 2441, line 10. Attach Form 2441	13 g		
h	Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken after March 31, 2021	13 h		
z	Other payments or refundable credits. List type and amount . ▶ _____	13 z		
14	Total other payments or refundable credits. Add lines 13a through 13z.		14	
15	Total Payments: Part II, lines 9 through 12 and 14, Withholding (Form 1040, line 25d), Estimated Tax Payments (Form 1040, line 26) and Form 1040, lines 27-30		15	22,865.
	Other Payments and Refundable Credits (Form 1040, line 32) . ▶ _____			

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? **Yes.** Complete the following. **No**
 Designee's Name ▶ _____
 Phone Number ▶ _____ Personal Identification Number (PIN) . . ▶ _____

Signature and Paid Preparer

Sign Here

Joint return? See instructions.
 Keep a copy of this return for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the year. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your Signature	Date	Your Occupation	If the IRS sent you an Identity Protection PIN, enter it here
_____	_____	<u>Engineer</u>	▶ _____
Spouse's Signature. If joint, both must sign.	Date	Spouse's Occupation	▶ _____
_____	_____	_____	_____
Daytime Phone No.		Email Address	
<u>(330) 550-3876</u>		_____	

Paid Preparer's Use Only

Print/Type Preparer's name	Preparer's PTIN	Check if:
_____	_____	<input type="checkbox"/> Self-employed
Preparer's Signature	Date	
_____	_____	
Firm's Adress (or yours if self-employed)	Firm's EIN.	Phone No.
<u>Self-Prepared</u>	_____	_____
_____	State	ZIP Code
_____	_____	_____

Filing Address Information

Send Form 1040 to: Internal Revenue Service
 P.O. Box 802501
 Cincinnati, OH 45280-2501

Name(s) Shown on Return Arpan Kundu	Your SSN 736-07-2154
--	-------------------------

Line 4b - Adjustment for trade or business income or loss

(a) Activity name	(b) Gain or loss
Enter additional adjustments not included above:	
Adjustment for trade or business income not subject to net investment tax	

Line 5b - Adjustment for gain or loss on dispositions

(a) Activity name	(b) Gain or loss
Capital loss carryover adjustment from 2020 for net investment tax purposes	
Enter additional adjustments not included above and check the box if a capital gain or loss:	
	<input type="checkbox"/>
	<input type="checkbox"/>
Net gain or loss from disposition of property not subject to net investment tax	

Capital gain/loss not included in net investment income

(a) Activity name	(b) Capital Gain or Loss
Capital gain or loss from sale of property not subject to net investment income tax	

Calculation of line 5b adjustment due to capital loss carryforward

1	Net capital loss not included in net investment income	1	0.
2	Capital loss carryover to next year	2	
3	Lesser of line 1 or line 2 (Included as an adjustment on line 5b table above).	3	0.

Line 7 - Other modifications to investment income

1	Casualty and theft losses reported on Schedule A, line 15.	1	
2	Amounts reported on Form 8814, line 12	2	
3	Adjustment for distributions from estates and trusts	3	
4	Schedules C and F income/loss included in net investment income.	4	
5	Substitute interest and dividend payments	5	119.
6	Recovery of a prior year deduction	6	
7		7	
8	Total other modifications to investment income	8	119.

Line 9b - State, local, and foreign income taxes allocable to net investment income

1	State and local income taxes	1	_____
2	Investment income.	2	_____
3	Total adjusted gross income	3	_____
4	Divide line 2 by line 3. Enter result as a decimal amount.	4	_____
5	State and local income taxes allocable to investment income	5	_____
6	State and local taxes (Schedule A, line 5e)	6	_____
7	Lesser of line 5 or line 6.	7	_____
8	Foreign income taxes	8	_____
9	Foreign income taxes allocable to investment income. Line 8 times line 4.	9	_____
10	Add lines 7 and 9. State, local and foreign income taxes allocable to investment income	10	_____

Lines 9 and 10 - Application of Itemized Deduction Limitations Worksheet

Part III - Application of Section 68 to Deductions Properly Allocable to Investment Income

1	Reserved	1	_____						
2	Enter the amount of state, local, and foreign income taxes that are properly allocable to investment income	2	_____						
3	Enter the amount of other Itemized Deductions subject to the section 68 limitation and properly allocable to investment income before any itemized deduction limitation: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; height: 15px;">_____</td> <td style="width: 50%; height: 15px;">_____</td> </tr> <tr> <td style="height: 15px;">_____</td> <td style="height: 15px;">_____</td> </tr> <tr> <td style="height: 15px;">_____</td> <td style="height: 15px;">_____</td> </tr> </table>	_____	_____	_____	_____	_____	_____	3	_____
_____	_____								
_____	_____								
_____	_____								
4	Enter the total deductions properly allocable to investment income subject to the section 68 limitation. Enter the sum of lines 1 through 3.	4	_____						
5	Enter the amount of total itemized deductions allowed after the section 68 limitation. Form 1040, line 12	5	_____						
6	Enter all other itemized deductions allowed but not subject to the section 68 deduction limitation:	6	_____						
7	Subtract line 6 from line 5.	7	_____						
8	Enter the lesser of line 7 or line 4	8	_____						

Part IV - Reconciliation of Schedule A Deductions to Form 8960 plus additional expenses, lines 9 and 10

(A)	(B)	(C)
Reenter the amounts and descriptions from Part III, lines 1-3	Fraction (see Help)	Column A times B
Miscellaneous Itemized Deductions properly allocable to Investment Income reportable on Form 8960, line 9c:		
1 Reserved.		
2 State, local, and foreign income taxes.	x	=
Itemized Deductions Subject to Section 68 reportable on Form 8960, line 10:		
3 _____	x	=
_____	x	=
_____	x	=
_____	x	=
Penalty on early withdrawal of savings		
Other modifications:		

Total additional modifications to Form 8960, line 10		

Calculation of Former Passive Activity Suspended Losses Allowed as Deduction Against NII

1) Former Passive Activity Suspended Losses

(a) Activity name	(b) Suspended 12/31/2020	(c) Suspended 12/31/2021	(d) Used against activity	(e) Used against other passive

2) Former Passive Activity Suspended Losses - Schedule D

(a) Activity name	(b) Suspended 12/31/2020	(c) Suspended 12/31/2021	(d) Used against activity	(e) Used against other passive

3) Former Passive Activity Suspended Losses - Form 4797

(a) Activity name	(b) Suspended 12/31/2020	(c) Suspended 12/31/2021	(d) Used against activity	(e) Used against other passive

Name(s) Shown on Return
Arpan Kundu

Social Security Number
736-07-2154

	(a) Taxpayer	(b) Spouse
1 Child's investment income, from Form 8814.		
2 Winnings:		
a From Form W-2G		
b Gambling winnings not reported on Form W-2G		
c Total gambling winnings.		
d Winnings (prizes, etc.) from Form 1099-MISC, box 3.		
e Other non-gambling awards and prizes		
3 Taxable income from Forms 1099-MISC or 1099-NEC:		
a Substitute payments in lieu of interest or dividends	119 .	
b1 Other income from box 3 (Excluding Olympic prize money)		
b2 Other income from box 3 Olympic prize money		
b Total Other income from box 3		
c Alaska Permanent Fund.		
d Tribal Gaming		
e Non-Employee Compensation from Form 1099-NEC box 1		
f Rent from personal property from Form 1099-MISC box 1		
4 Taxable income from Form 1099-Q or 1099-QA:		
a Qualified tuition program distributions		
b Coverdell ESA distributions		
c ABLE account distributions		
5 Taxable income from Form 1099-G:		
a Grants		
b RTAA payments		
6 Foreign earned income and housing exclusion, from Form 2555		
7 Net operating loss carryover from a prior year		
8 Other income, from Schedule(s) K-1		
9 Taxable distribution from:		
a Form 8853:		
1 Taxable Archer MSA distributions MSA		
2 Taxable Medicare Advantage distributions Med MSA		
3 Taxable long term care distributions LTC		
4 Total Form 8853		
b Form 8889, Health Savings Accounts		
1 Taxable HSA Distributions from Form 1099-SA		
2 Last month rule and qualified HSA funding distribution amt		
3 Total Form 8889		
10 Refunds or reimbursements of deductions claimed in a prior year:		
a Reimbursement for deducted medical expenses		
b Refunds of deducted taxes (not state or local income taxes)		
	Type of Tax	State or Local ID
c Recapture of deducted moving expenses		
d Reimbursement for deducted casualty or theft loss		
e Reimbursement for deducted employee business expenses		
f Other refunds or reimbursements		
11 Recoveries of bad debts deducted in a prior year.		
12 Jury duty pay		
13 Bartering income not reported elsewhere		
14 Income from the rental of personal property		
15 Income from the Cancellation of Debt:		
a From Form 1099-C:		
1 Amount of debt canceled from box 2		
2 Amount of canceled debt excluded from income		
3 Taxable amount of canceled debt.		
b From Schedule(s) K-1		
16 Taxable income from Form 1099-K:		
a Payment Card/Third Party Network Transactions		
17 Income from "not for profit" activities (hobbies):		

18	Limitation on business losses (Form 461)		
19	Global intangible low-taxed income (Form 8992)		
19	Does not apply to Form 1040NR		
20	Does not apply to Form 1040NR		
20	Section 965 deferred foreign income (Form 965)		
21	Unemployment income and repayment		
a	Union unemployment benefits		
b	Private fund unemployment benefits		
c	State employee unemployment benefits		
d	Repayment of non-government unemployment benefits		
22	Other taxable income:		
a	Employer stock compensation income for non-employee		
b	_____		

23	Income from Community Property:		
a	Positive community property adjustment		
b	Negative community property adjustment (enter as positive) . . .		
24	Total. Add lines 1 through 14, 15a(3), 15b, 16 through 23. Enter here and on Schedule 1, line 8	119.	

Federal Information Worksheet

▶ Keep for your records

2021

Part I – Personal Information

Information in Part I is **completely calculated** from entries on Personal Information Worksheets.

Taxpayer:

First name Arpan
 Middle initial _____ Suffix _____
 Last name Kundu
 Social security no. 736-07-2154
 Occupation Engineer
 Date of birth 08/06/1990 (mm/dd/yyyy)
 Age as of 1-1-2022 31
 Daytime phone (330) 550-3876 Ext _____
 Legally blind
 Date of death _____

Spouse:

First name _____
 Middle initial _____ Suffix _____
 Last name _____
 Social security no. _____
 Occupation _____
 Date of birth _____ (mm/dd/yyyy)
 Age as of 1-1-2022 _____
 Daytime phone _____ Ext _____
 Legally blind
 Date of death _____

Dependent of Someone Else:

Can taxpayer be claimed as dependent of another person (such as parent)? . . . Yes No
 If yes, **was** taxpayer claimed as dependent on that person's return? Yes No

Dependent of Someone Else:

Can spouse be claimed as dependent of another person (such as parent)? . . . Yes No
 If yes, **was** spouse claimed as dependent on that person's return? Yes No

Credit for the Elderly or Disabled (Schedule R):

Is the taxpayer retired on total and permanent disability? . . Yes No

Credit for the Elderly or Disabled (Schedule R):

Is the spouse retired on total and permanent disability? . . Yes No

Presidential Election Campaign Fund:

Does the taxpayer want \$3 to go to the Presidential Election Campaign Fund? . . Yes No

Presidential Election Campaign Fund:

Does the spouse want \$3 to go to the Presidential Election Campaign Fund? . . Yes No

Part II – Address and Federal Filing Status (enter information in this section)

US Address:

Address 4909 W Joshua Blvd Apt no. 1051
 City Chandler State AZ ZIP code 85226-6020

Foreign Address:

Check this box to use foreign address . . ▶
 Address _____ Apt no. _____
 City _____
 Foreign code _____ Foreign country _____
 Foreign province/county _____ Foreign postal code _____

APO/FPO/DPO address, check if appropriate APO FPO DPO

Home phone _____
 Check to print phone number on Form 1040 Home Taxpayer daytime Spouse daytime

Print Form 1040-SR instead of Form 1040 Yes No

Federal filing status:

1 Single
 2 Married filing jointly
 3 Married filing separately
 Check this box if you **did not** live with your spouse at any time during the year. ▶
 Check this box if you are eligible to claim your spouse's exemption/blind/over age 65 (see Help) ▶
 4 Head of household
 If the 'qualifying person' is your child but **not** your dependent:
 Child's First name _____ MI _____ Last Name _____ Suff _____
 Child's social security number _____
 5 Qualifying widow(er)
 Check the appropriate box for the year your spouse died 2019 ▶ 2020 ▶
 Are you a dependent with a qualifying child Yes ▶ No ▶
 Enter qualifying person's name:
 Child's First name _____ MI _____ Last Name _____ Suff _____
 Child's social security number _____

Part III – Dependent/Earned Income Credit/Child and Dependent Care Credit Information

Information in Part III is completely calculated from entries on Dependent/Nondependent Info Worksheets.

First name Last name	MI Suff	Social security number Relationship	Date of birth (mm/dd/yyyy)			Date of death (mm/dd/yyyy)			E I C	Lived with taxpyr in U.S.	Not qual credit other dep Educ Tuitn and Fees	* D e p
			Age	C o d e	Not qual for child tax cr	Qualified child/dep care exps incurred and paid 2021						
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

* "Yes" - qualifies as dependent, "No" - does not qualify as dependent

Part IV – Earned Income Credit Information (you must answer these questions to calculate EIC)

Is the taxpayer or spouse a qualifying child for EIC for another person? ... Yes No
Was the taxpayer's (and spouse's if married filing jointly) home in the United States for more than half of 2021? ... Yes No
If the SSN of the taxpayer, or spouse if married filing jointly, was obtained to get a federally funded benefit, such as Medicaid, and the Social Security card contains the legend Not Valid for Employment, check this box (see Help) ...
Check if you are filing head of household and your spouse is a nonresident alien and you lived with your spouse during the last six months of 2021 ...
Check if you were notified by the IRS that EIC cannot be claimed in 2021 or if you are ineligible to claim the EIC in 2021 for any other reason ...

Part V – Direct Deposit or Direct Debit Information (not applicable for Form 9465)

Do you want to elect direct deposit of any federal tax refund? ... Yes No
Do you want to elect direct debit of federal balance due (Electronic filing only)? ... Yes No

If you selected either of the options above, fill out the information below:

Name of Financial Institution (optional) ... Chase
Check the appropriate box ... Checking X Savings
Routing number ... 074000010 Account number ... 252175272

Enter the following information only if you are requesting direct debit of balance due:

Enter the payment date to withdraw from the account above ... 03/30/2022
Balance-due amount from this return ...

Amended Returns:

Do you want to elect direct debit of federal amended balance due (e-File only)? ... Yes No
Enter the payment date to withdraw from the account above ...
Balance-due amount from this amended return ...

Part VI – Additional Information for Your Federal Return

Standard Deduction/Itemized Deductions:

Check this box if you are itemizing for state tax or other purposes even though your itemized deductions are less than your standard deduction ...
Check this box if you are married filing separately and your spouse itemized deductions ...
Check this box to take the standard deduction even if less than itemized deductions ...

Real Estate Professionals:

Do you or your spouse qualify for the special passive activity rules for taxpayers in real property business? (see Help) ... Yes No

Credit for Qualified Retirement Savings Contributions (Form 8880):

Is the taxpayer a full-time student? ... Yes No
Is the spouse a full-time student? ... Yes No

American Opportunity and Lifetime Learning Credit (Form 8863)

For 2021, were you (or your spouse if married) a nonresident alien for any part of the year, and did not elect to be treated as a resident alien? ... Yes No

Foreign Tax Credit (Form 1116):

Check this box to file Form 1116 even if you're not required to file Form 1116 ...
Resident country ... USA

Excludable Income from Am. Samoa, Guam, Commonwealth of the N. Mariana Islands, or Puerto Rico:

Excludable income of bona fide residents of American Samoa, Guam, or the Commonwealth of the Northern Mariana Islands ...
Excludable income from Puerto Rico ...

Dual Status Alien Return:

Check this box if you are a dual-status alien ...
Check this box to print 'DUAL-STATUS STATEMENT' on Form 1040 ...

Third Party Designee:

Caution: Review transferred information for accuracy.
Do you want to allow another person to discuss this return with the IRS? ... Yes No
If Yes, complete the following:
Third party designee name ...
Third party designee phone number ...
Personal Identification number (enter any 5 numbers) ...

Disaster Tax Relief:

Check if you took a disaster distribution between 2018 and 2020 ...

Part VI – Additional Information for Your Federal Return – Continued

Personal Representative for deceased taxpayers:

Name of personal representative required for E-filed returns when Form 1310 is not filed or it is not the surviving spouse ▶ _____

Part VII – State Filing Information

Identity Protection PIN:

If the IRS sent the taxpayer an Identity Protection PIN, enter it here ▶ _____

If the IRS sent the spouse an Identity Protection PIN, enter it here ▶ _____

Taxpayer:

Enter the taxpayer’s state of residence as of December 31, 2021 ▶ AZ

Check the appropriate box:

Taxpayer is a resident of the state above for the entire year ▶

Taxpayer is a resident of the state above for only part of year ▶

Date the taxpayer established residence in state above ▶ _____

In which state (or foreign country) did the taxpayer reside before this change? ▶ _____

Spouse:

Enter the spouse’s state of residence as of December 31, 2021 ▶ _____

Check the appropriate box:

Spouse is a resident of the state above for the entire year ▶

Spouse is a resident of the state above for only part of year ▶

Date the spouse established residence in state above ▶ _____

In which state (or foreign country) did the spouse reside before this change? ▶ _____

Nonresident states:

Nonresident State(s)	Taxpayer/Spouse/Joint

Check this box if you are in a Registered Domestic Partnership or a civil union ▶

If you checked the box on the line above, also check the appropriate box below:

Check if this is your individual federal return you are filing with the IRS ▶

Check if this is the joint return created to file joint state tax return (see Help) ▶

Use the PIN that you signed last year's tax return with.

Taxpayer's Prior year PIN . . . _____

Spouse's Prior year PIN _____

These signature PINs are chosen by the taxpayer and spouse and used for e-filing your tax return

Taxpayer's PIN used to sign the return 92142

Spouse's PIN used to sign the return _____

Taxpayer:

Drivers license or state ID number M40191716

Issued by what state AZ

License or ID license . ▶ ID . ▶ neither . ▶ decline . ▶

Spouse

Drivers license or state ID number _____

Issued by what state _____

License or ID license . ▶ ID . ▶ neither . ▶ decline . ▶

Personal Information Worksheet
For the Taxpayer

2021

Keep for your records

QuickZoom to another copy of Personal Information Worksheet ▶
QuickZoom to Federal Information Worksheet ▶

Part I – Taxpayer's Personal Information

First name . . . Arpan Middle initial . . . Last name . . . Kundu
Suffix
Social security no. . . 736-07-2154 Member of U.S. Armed Forces in 2021? . . Yes No
Date of birth 08/06/1990 (mm/dd/yyyy) age as of 1-1-2022 31
Occupation Engineer Daytime phone (330)550-3876 Ext

Marital status . . . Single
If widowed, check the appropriate box for the year your spouse died:
After 2021 ▶ 2021 . ▶ 2020 . ▶ 2019 . ▶ Before 2019 . ▶
Are you retired on total and permanent disability? (for Schedule R, see Help) ▶ Yes No
Check if this person is legally blind ▶ Yes No
If deceased, enter the date of death ▶ (mm/dd/yyyy)

Were you under the age of 16 as of 1-1-2022 and this is the first year you
are filing a tax return? ▶ Yes No

Language in which you want the IRS to communicate with you ▶

Do you want \$3 to go to Presidential Election Campaign Fund? ▶ Yes No

Part II – Questions for Individuals Who Could Be Or Are Dependents of Another Taxpayer

- 1 Can someone (such as your parent) claim you as a dependent? ▶ Yes No
- 2 If you answered 'Yes' to question 1, are you actually claimed as a dependent
on that person's tax return? ▶ Yes No
*Questions 3 through 5 are only required for individuals who claim the
American Opportunity Credit.*
- 3 Were you a full-time student during any part of five months during 2021? ▶ Yes No
- 4 Did your earned income exceed one-half of your support? ▶ Yes No
- 5 Was at least one of your parents alive on December 31, 2021? ▶ Yes No

Part III – Taxpayer's State Residency Information

Enter this person's state of residence as of December 31, 2021 AZ
Check the appropriate box:
This person is a resident of the state above for the entire year
This person is a resident of the state above for only part of year
Date this person established residence in state above ▶
In which state (or foreign country) did this person reside before this change? ▶

Part IV – Dependent Care Expenses

Qualified dependent care expenses incurred and paid for this person in 2021
Unreimbursed medical expenses paid for qualifying person in 2021
Employment taxes paid for dependent care providers in 2021
Full-time student for 5 calendar months during 2021? ▶ Yes No
Disabled person who was not physically or mentally capable of self-care? ▶ Yes No
This person is a qualifying person for the child and dependent care credit ▶ Yes No

Part-Year Resident State Allocation Worksheet

2021

▶ Keep for your records

Check the box to activate this worksheet

Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security Number <u>736-07-2154</u>
---	--

INCOME	Federal Amount	Resident State	Source State	Allocated Amount
1 T Wages, salaries, tips		—	—	
		—	—	
		—	—	
S Wages, salaries, tips		—	—	
		—	—	
		—	—	

* Enter state of source only if income is associated with a trade or a business ▼

	Federal Amount	Residency Info			* Src St	Allocated Amount
		From mm/dd	To mm/dd	Res St		
2 T Taxable interest						
S Taxable interest						
3 T Dividends						
S Dividends						
4 T State/local tax refund						
S State/local tax refund						
5 T Alimony received						
S Alimony received						

* Enter the state of source for this income ▼

INCOME (continued)	Federal Amount		Residency Info			* Src St	Allocated Amount
	Total	Subtotal	From mm/dd	To mm/dd	Res St		
6 T Business inc or loss .							
S Business inc or loss .							
7 T Farm income or loss .							
S Farm income or loss .							
8 Total Schedule E. T			See Sch E Income Allocation Smart Worksheet				
S							

* Enter the state of source for this income (See Tax Help) ▼

INCOME (continued)	Federal Amount	Residency Info			* Src St	Allocated Amount
		From mm/dd	To mm/dd	Res St		
9 T Capital gain or loss						
S Capital gain or loss						
10 T Other gains/losses						
S Other gains/losses						
11 T Unemployment compensation .						
S Unemployment compensation .						

	Federal Amount	Residency Info			Allocated Amount
		From mm/dd	To mm/dd	Res State	
12 T Taxable IRA distributions					
S Taxable IRA distributions					
13 T Taxable pensions/annuities . . .					
S Taxable pensions/annuities . . .					
14a T Taxable social security benefits .					
S Taxable social security benefits .					
b T Taxable railroad retirements . .					
S Taxable railroad retirements . .					
15 Total other income T					
16 Total Income. T					

ADJUSTMENTS (continued)	Federal Amount	Residency Info			Allocated Amount
		From mm/dd	To mm/dd	Res St	
22 T Alimony paid					
S Alimony paid					
23 T IRA deduction					
S IRA deduction					
24 T Student loan interest deduction					
S Student loan interest deduction					

* Enter the state of source for this adjustment

ADJUSTMENTS (continued)	Federal Amount	Residency Info			* Src St	Allocated Amount
		From mm/dd	To mm/dd	Res St		
25 T Self-employment tax						
S Self-employment tax						
26 T SEP, SIMPLE and qualified plans						
S SEP, SIMPLE and qualified plans						
27 T Self-employed health insurance						
S Self-employed health insurance						
28 T Reserved						
S Reserved						
29 Other adjustments T						
S						
	Federal Amount	Residency Info				Allocated Amount
		From mm/dd	To mm/dd	Res St		
30 Total adjustments T						
S						
31 Adjusted gross income T						
S						

► Keep for your records

Name(s) Shown on Return
Arpan Kundu

Social Security Number
736-07-2154

Form W-2 Summary

Box No.	Description	Taxpayer	Spouse	Total
1	Total wages, tips and compensation:			
	Non-statutory & statutory wages not on Sch C . . .	140,467.		140,467.
	Statutory wages reported on Schedule C			
	Foreign wages included in total wages.			
	Unreported tips.	0.		0.
2	Total federal tax withheld	22,865.		22,865.
3 & 7	Total social security wages/tips	142,800.		142,800.
4	Total social security tax withheld	8,854.		8,854.
5	Total Medicare wages and tips	145,999.		145,999.
6	Total Medicare tax withheld	2,117.		2,117.
8	Total allocated tips			
9	Not used			
10 a	Total dependent care benefits			
b	Offsite dependent care benefits			
c	Onsite dependent care benefits			
11	Total distributions from nonqualified plans . . .			
12 a	Total from Box 12	189.		189.
b	Elective deferrals to qualified plans			
c	Roth contrib. to 401(k), 403(b), 457(b) plans. .			
d	Deferrals to government 457 plans			
e	Deferrals to non-government 457 plans			
f	Deferrals 409A nonqual deferred comp plan. .			
g	Income 409A nonqual deferred comp plan. . .			
h	Uncollected Medicare tax			
i	Uncollected social security and RRTA tier 1 . .			
j	Uncollected RRTA tier 2			
k	Income from nonstatutory stock options			
l	Non-taxable combat pay			
m	QSEHRA benefits			
n	Total other items from box 12	189.		189.
14 a	Total deductible mandatory state tax			
b	Total deductible charitable contributions			
c	This line does not apply to TurboTax			
d	Total RR Compensation			
e	Total RR Tier 1 tax			
f	Total RR Tier 2 tax			
g	Total RR Medicare tax			
h	Total RR Additional Medicare tax			
i	Total RRTA tips.			
j	Total other items from box 14			
k	Total sick leave subject to \$511 limit			
l	Total sick leave subject to \$200 limit			
m	Total emergency family leave wages			
16	Total state wages and tips	140,467.		140,467.
17	Total state tax withheld	3,631.		3,631.
19	Total local tax withheld.			

Name Arpan Kundu Social Security Number 736-07-2154

Spouse's W-2
 Do not transfer this W-2 to next year

Military: Complete Part VI on Page 2 below.

<p>a Employee's social security no. . . <u>736-07-2154</u></p> <p>b Employer ID number (EIN) . . . <u>26-2071828</u></p> <p>c Employer's name, address, and ZIP code <u>Intel Federal LLC</u></p> <p>Street <u>2200 Mission College Blvd RNB4-151</u> City <u>Santa Clara</u> State <u>CA</u> ZIP Code <u>95054</u></p> <p>Foreign Province _____ Foreign Postal Code _____ Foreign Country _____</p> <p>d Control number <u>.199 Intel</u></p> <p><input type="checkbox"/> Transfer employee information from the Federal Information Worksheet</p> <p>e Employee's name First <u>Arpan</u> M.I. _____ Last <u>Kundu</u> Suff. _____</p> <p>f Employee's address and ZIP code Street <u>4909 West Joshua Blvd Apt 1051</u> City <u>Chandler</u> State <u>AZ</u> ZIP Code <u>85226</u></p> <p>Foreign Province _____ Foreign Postal Code _____ Foreign Country _____</p>	<p>1 Wages, tips, other compensation <u>140,466.94</u></p> <p>3 Social security wages <u>142,800.00</u></p> <p>5 Medicare wages and tips <u>145,999.46</u></p> <p>7 Social security tips _____</p> <p>▶ Enter unreported tips in Part VII on Page 2 below.</p>	<p>2 Federal income tax withheld <u>22,864.75</u></p> <p>4 Social security tax withheld <u>8,853.60</u></p> <p>6 Medicare tax withheld <u>2,116.99</u></p> <p>8 Allocated tips _____</p>
<p>11 Nonqualified plans _____</p> <p>12 Enter box 12 below _____</p> <p>13 <input type="checkbox"/> Statutory employee <input checked="" type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay</p> <p>14 Enter box 14 below after entering boxes 18, 19, and 20. NOTE: Enter box 15 before entering box 14.</p>	<p>9 _____</p> <p>10 Dependent care benefits Distributions from sect. 457 and nonqualified plans (Important, see Help) _____</p>	

Box 12 Code	Box 12 Amount	If Box 12 code is:
<u>C</u>	<u>189.24</u>	A: Enter amount attributable to RRTA Tier 2 tax . . . _____ M: Enter amount attributable to RRTA Tier 2 tax . . . _____ P: Double-click to link to Form 3903, line 4 . . . _____ R: Enter MSA contribution for Taxpayer _____ Spouse _____ W: Enter HSA contribution for Taxpayer _____ Spouse _____ G: Is employer a state or local government? Yes <input type="checkbox"/> No <input type="checkbox"/>

Box 15 State	Box 15 Employer's state I.D. number	Box 16 State wages, tips, etc.	Box 17 State income tax
<u>AZ</u>	<u>26-2071828</u>	<u>140,466.94</u>	<u>3,631.33</u>

I confirm that the state withholding identification number(s) are accurate

Box 20 Locality name	Box 18 Local wages, tips, etc.	Box 19 Local income tax	Associated State

Box 14 Description or Code on Actual Form W-2	Amount	TurboTax Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select "Other".)

Forms 1099-MISC / 1099-NEC Summary

2021

▶ Keep for your records

Name(s) Shown on Return

Arpan Kundu

Social Security Number

736-07-2154

Box	Description	Taxpayer	Spouse	Total
	Form 1099-MISC Summary			
1	Total Rents			
	▶ Schedule C			
	▶ Schedule E			
	▶ Form 4835			
	▶ Other Income			
2	Total Royalties	0.		0.
	▶ Schedule C			
	▶ Schedule E			
3	Total Other income	0.		0.
	▶ Schedule C			
	▶ Schedule F			
	▶ Form 4835			
	For Form 1040:			
	▶ Winnings (Prizes, etc.)			
	▶ Tribal Gaming			
	▶ Alaska Permanent Fund			
	▶ Other Income			
4	Federal tax withheld	0.		0.
5	Fishing boat proceeds			
6	Medical and health care payments			
8	Substitute payments	119.		119.
9	Total Crop insurance proceeds			
	▶ Schedule F			
	▶ Form 4835			
10	Gross proceeds paid to an attorney			
	▶ Taxable amount			
11	Fish purchased for resale			
12	Section 409A deferrals			
13	Excess golden parachute payments			
14	Nonqualified deferred compensation			
15	State tax withheld — total			
Total	Boxes 1-3, 5-14	119.		119.
	Form 1099-NEC Summary			
1	Total Nonemployee compensation			
	▶ Schedule C			
	▶ Schedule F			
	▶ Wages			
	▶ Other Income			
4	Federal tax withheld			
5	State tax withheld — total			

Name Arpan Kundu Social Security Number 736-07-2154

Payer's Name Robinhood Securities LLC
Payer's TIN EIN 38-4019216 or SSN
Account number (for your records only) 164958803

Spouse's 1099-MISC Do not transfer this 1099-MISC to next year

For each type of 1099-MISC income, select the appropriate form or schedule in your return on which to report this income. Double-click in the field next to the form's name and when the window appears, either "select or create" the copy on which you want to report the 1099-MISC income. See Help.

Box 1 Rents 0.00
Required: double-click to select the form on which to report this income:
Schedule C Form 4835
Schedule E Other Income

Box 2 Royalties 0.00
Required: double-click to select the form on which to report this income:
Schedule C
Schedule E

Box 3 Other income 0.00
Required: double-click to select the form on which to report this income:
Schedule C Form 4835
Schedule F
Winnings (Prizes, etc.)
Tribal Member Gaming Payments
From Alaska Permanent Fund
Other Income
Back Wages from Lawsuit. Amount:
Olympic or Paralympic Prize Money

Box 4 Federal income tax withheld 0.00

Box 5 Fishing boat proceeds
Required: double-click to select the Schedule C on which to report this income:
Schedule C

Box 6 Medical and health care payments
Required: double-click to select the Schedule C on which to report this income:
Schedule C

Box 8 Substitute payments in lieu of dividends or interest 118.70

Box 9 Crop insurance proceeds
Required: double-click to select the form on which to report this income:
Schedule F
Form 4835

Box 10 Gross proceeds paid to an attorney
Taxable amount from box 10 to Schedule C
Required: double-click to select the Schedule C on which to report this income:
Schedule C

Box 11 Fish purchased for resale
Required: double-click to select the Schedule C on which to report this income:
Schedule C

Box 12 Section 409A deferrals

Box 13 Excess golden parachute payments
Report 20% excise tax on Form 1040

Box 14 Nonqualified deferred compensation

Boxes 15-17 State tax withheld - 1st state
State name (two letters) - 1st state
State ID number - 1st state
State income - 1st state
State tax withheld - 2nd state
State name (two letters) - 2nd state
State ID number - 2nd state
State income - 2nd state

I confirm that the state withholding identification number(s) are accurate

FATCA filing requirement

Additional Payer and Recipient Information

Payer's address and ZIP code

Street 500 Colonial Center Parkway
City Lake Mary
State FL ZIP Code 32746
Foreign Country

Recipient's address and ZIP code

Transfer address from Federal Information Wks
Street
City
State ZIP Code
Foreign Country

Wages, Salaries, & Tips Worksheet

2021

▶ Keep for your records

Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security Number <u>736-07-2154</u>
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The following amounts are included in the total entered on line 1 of Form 1040 or on line 8 of Form 1040NR:

	Taxpayer	Spouse	Total
1 Wages, from Form W-2	140,467.		140,467.
2 Miscellaneous income, from Form 8919			
3 Items from Form 1099-R:			
a Disability before minimum retirement age			
b Return of contributions			
4 Excess reimbursement, from Form 2106			
5 a Taxable tips, from Form 4137			
b Noncash tips			
6 Excess moving expense reimbursement, from Form 3903			
7 Wages earned as a household employee (if less than \$2,100 and without a Form W-2)			
8 Items not on Form W-2 or Form 1099-R:			
a Sick pay or disability payments			
b Total foreign source income			
c Check this box if the amount on line 8b is eligible for the foreign exclusion/deduction . ▶	<input type="checkbox"/>	<input type="checkbox"/>	
d Ordinary income from employer stock transactions not reported on Form W-2			
9 Other earned income:			
a Non-gov unemployment received/repaid 2021			
b _____			

10 Subtotal. Add lines 1 through 9	140,467.		140,467.
11 Taxable employer-provided dependent care benefits, from Form 2441			
12 Taxable employer-provided adoption benefits less any excluded benefits from Form 8839			
13 Scholarship/fellowship income not on Form W-2			
14 Other non-earned income:			

15 Total of lines 10 through 14	140,467.		140,467.

Name(s) Shown on Return
Arpan Kundu

Social Security Number
736-07-2154

		Regular Tax	Alternative Minimum Tax
If you are not reporting a gain on Form 4797, line 7, skip lines 1 through 9 and go to line 10.			
1	If you have a section 1250 property in Part III of Form 4797 for which you made an entry in Part I of Form 4797 (but not Form 6252), enter the smaller of line 22 or line 24 of Form 4797 for that property. If you did not have any such property, go to line 4.	1	
2	Enter the amount from Form 4797, line 26g, for the property for which you made an entry on line 1	2	
3	Subtract line 2 from line 1	3	
4	Enter the total unrecaptured section 1250 gain included on lines 26 or 37 of Form(s) 6252 from installment sales of trade or business property held more than one year	4	
5	Enter the total of any amounts reported on a Schedule K-1 from a partnership or an S corporation as "unrecaptured section 1250 gain".	5	
6	Add lines 3 through 5	6	
7	Enter the smaller of line 6 or the gain from Form 4797, line 7	7	
8	Enter the amount, if any, from Form 4797, line 8	8	
9	Subtract line 8 from line 7. If zero or less, enter -0-	9	
10	Enter the amount of any gain from sale of an interest in a partnership attributable to unrecaptured section 1250 gain.	10	
11	Enter the total of any amounts reported to you as "unrecaptured section 1250 gain" from an estate, trust, real estate investment trust or mutual fund		
		Regular	AMT
	a On Form 1099-DIV	0.	0.
	b On Form 2439		
	c On Schedule(s) K-1		
	d On Form 1099-R		
	e From Form 8814		
	f Other.		
	Total	11	
12	Enter the total of any unrecaptured section 1250 gain from sales (including installment sales) or other dispositions of section 1250 property held more than 1 year for which you did not make an entry in Part I of Form 4797 for the year of sale	12	
13	Add lines 9 through 12.	13	
14	If you had any section 1202 gain or collectibles gain or (loss), enter the total of lines 1 thru 4 of the 28% Rate Gain Worksheet . Otherwise, enter -0-	14	0.
15	Enter the (loss), if any, from Schedule D, line 7. If Schedule D, line 7, is zero or a gain, enter -0-	15	0.
16	Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), line 11, code D	16	
	a Enter your capital gain excess, if you are filing Form 2555	a	0.
17	Combine lines 14 through 16a. If the result is a (loss), enter it as a positive amount. If the result is zero or a gain, enter -0-	17	0.
18	Unrecaptured section 1250 gain. Subtract line 17 from line 13. If zero or less, enter -0-. If more than zero, enter the result here and on Schedule D, line 19.	18	

**Schedule D
Line 18**

28% Rate Gain Worksheet

2021

► Keep for your records

Name(s) Shown on Return
Arpan Kundu

Social Security Number
736-07-2154

				Regular Tax	Alternative Minimum Tax
1	Enter the total of all collectibles gain or (loss) from items you reported on Form 8949, Part II			1	
2	Enter as a positive number the amount of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code "Q" in column (f), that is 50% of the gain, plus 2/3 of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code "Q" in column (f), that is 60% of the gain, plus 1/3 of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code "Q" in column (f), that is 75% of the gain.				
		50 % Exclusion	60 % Exclusion	75% Exclusion	
a	Schedule D . . .	_____	_____	_____	
b	Form 8814 . . .	_____	_____	_____	
c	Schedule B . . .	_____	_____	_____	
d	Form 6252 . . .	_____	_____	_____	
e	Form 2439 . . .	_____	_____	_____	
f	Other	_____	_____	_____	
	Total	_____	_____	_____	2
3	Enter the total of all collectibles gain or (loss) from:				
		Regular	AMT		
a	Form 4684, line 4 (but only if line 15 is more than zero)	_____	_____		
b	Form 6252	_____	_____		
c	Form 6781, Part II	_____	_____		
d	Form 8824	_____	_____		
	Total	_____	_____		3
4	Enter the total of any collectibles gain reported to you on:				
		Regular	AMT		
a	Form 1099-DIV, box 2d	_____	_____		
b	Form 2439, box 1d	_____	_____		
c	Schedule K-1 from a partnership, S corporation, estate, or trust	_____	_____		
d	Disposition of interest in partnership or S corporation	_____	_____		
e	Other	_____	_____		
	Total	_____	_____		4
5	Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), line 11, code C			5	
6	If Schedule D, line 7, is a (loss), enter that (loss) here. Otherwise, enter -0-.			6	
7	Combine lines 1 through 6. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 18			7	
8	Enter the amount of any capital gain excess			8	0.
9	Subtract line 8 from line 7. If zero or less, enter -0-. Enter this amount on Schedule D Tax Worksheet, line 11a			9	0.

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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1 a Enter your taxable income from Form 1040, line 15 **1 a** 196,172.
b Enter amount on line 2c of your (and spouse's) Foreign Earned Income Tax Wksht **b** _____
c Add lines 1a and 1b **1 c** 196,172.

2 a Enter your qualified dividends from Form 1040, line 3a **2 a** 166.
b Enter any capital gain excess attributable to qualified dividends **b** _____
c Subtract line 2b from line 2a **2 c** 166.

3 Amount from Form 4952, line 4g **3** _____

4 a Amount from Form 4952, line 4e **4 a** _____
b Amount from the dotted line next to Form 4952, line 4e **b** _____
c Line 4b, if applicable, 4a, if not **c** _____

5 Subtract line 4c from line 3 **5** 0.

6 Subtract line 5 from line 2c. If zero or less, enter -0- **6** 166.

7 a Enter line 15 of Schedule D **7 a** 7,423.
b Enter line 16 of Schedule D **b** 68,240.
c Enter the **smaller** of line 7a or line 7b **7 c** 7,423.

8 Enter the **smaller** of line 3 or line 4c **8** _____

9 a Subtract line 8 from line 7 **9 a** 7,423.
b Enter any capital gain excess attributable to capital gains **b** _____
c Subtract line 9b from line 9a **9 c** 7,423.

10 Add lines 6 and 9c **10** 7,589.

11 a Enter the amount from Schedule D, line 18 **11 a** 0.
b Enter the amount from Schedule D, line 19 **b** _____
c Add lines 11a and 11b **11 c** 0.

12 Enter the **smaller** of line 9c or line 11c **12** 0.

13 Subtract line 12 from line 10 **13** 7,589.

14 Subtract line 13 from line 1c. If zero or less, enter -0- **14** 188,583.

15 Enter:
• \$40,400 if single or married filing separately,
• \$80,800 if married filing jointly or qualifying widow(er), or
• \$54,100 if head of household.] **15** 40,400.

16 Enter the **smaller** of line 1c or line 15 **16** 40,400.

17 Enter the **smaller** of line 14 or line 16 **17** 40,400.

18 Subtr ln 10 from ln 1c. If zero or less, enter -0- **18** 188,583.

19 Enter the **smaller** of line 1c or:
• \$164,925 if single or married filing sep,
• \$329,850 if MFJ or qual widow(er), or
• \$164,900 if head of household.] **19** 164,925.

20 Enter the **smaller** of line 14 or line 19 **20** 164,925.

21 Enter the **larger** of line 18 or line 20 **21** 188,583.

22 Subtract line 17 from line 16. This amount is taxed at 0% **22** 0.

If lines 1c and 16 are the same, skip lines 23 through 43 and go to line 44. Otherwise, go to line 23.

23 Enter the **smaller** of line 1c or line 13 **23** 7,589.

24 Enter the amount from line 22 (if line 22 is blank, enter -0-) **24** 0.

25 Subtract line 24 from line 23. If zero or less, enter -0- **25** 7,589.

26 Enter:
• \$445,850 if single,
• \$250,800 if married filing separately,
• \$501,600 if married filing jointly or qualifying widow(er), or
• \$473,750 if head of household.] **26** 445,850.

27 Enter the smaller of line 1c or line 26 **27** 196,172.

28 Add lines 21 and 22 **28** 188,583.

29 Subtract line 28 from line 27. If zero or less, enter -0- **29** 7,589.

30 Enter the **smaller** of line 25 or line 29 **30** 7,589.

31 Multiply line 30 by 15% (0.15) **31** 1,138.

32 Add lines 24 and 30 **32** 7,589.

If lines 1 and 32 are the same, skip lines 33 through 43 and go to line 44. Otherwise, go to line 33

33 Subtract line 32 from line 23 **33** 0.

34 Multiply line 33 by 20% (0.20) **34** 0.

If Schedule D, line 19, is zero or blank, skip lines 35 through 40 and go to line 41. Otherwise, go to line 35.

35 Enter the **smaller** of line 9c above or Schedule D, line 19 **35** _____

36 Add lines 10 and 21 **36** _____

37 Enter the amount from line 1c above **37** _____

38	Subtract line 37 from line 36. If zero or less, enter -0-	38	_____
39	Subtract line 38 from line 35. If zero or less, enter -0-	39	_____
40	Multiply line 39 by 25% (0.25)	40	_____
If Schedule D, line 18, is zero or blank, skip lines 41 through 43 and go to line 44. Otherwise, go to line 41.			
41	Add lines 21, 22, 30, 33, and 39	41	_____
42	Subtract line 41 from line 1c	42	_____
43	Multiply line 42 by 28% (0.28)	43	_____
44	Figure the tax on the amount on line 21 . If the amount on line 21 is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 21 is \$100,000 or more, use the Tax Computation Worksheet	44	<u>41,174.</u>
45	Add lines 31, 34, 40, 43, and 44	45	<u>42,312.</u>
46	Figure the tax on the amount on line 1c . If the amount on line 1c is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 1c is \$100,000 or more, use the Tax Computation Worksheet	46	<u>43,602.</u>
47	Tax on all taxable income (including capital gains and qualified dividends). Enter the smaller of line 45 or line 46. Also include this amount on Form 1040, line 16	47	<u>42,312.</u>

Form 1040 Qualified Dividends and Capital Gain Tax Worksheet

2021

Line 16

► Keep for your records

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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1	Enter the amount from Form 1040 or 1040-SR, line 15.	1	<u>196,172.</u>
2	Enter the amount from Form 1040 or 1040-SR, line 3a	2	<u>166.</u>
3	Are you filing Schedule D? <input checked="" type="checkbox"/> Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or loss, enter -0-	3	<u>7,423.</u>
	<input type="checkbox"/> No. Enter the amount from Form 1040 or 1040-SR, line 7.		
4	Add lines 2 and 3	4	<u>7,589.</u>
5	Subtract line 4 from line 1. If zero or less, enter -0-	5	<u>188,583.</u>
6	Enter: \$40,400 if single or married filing separately, \$80,800 if married filing jointly or qualifying widow(er), \$54,100 if head of household.	6	<u>40,400.</u>
7	Enter the smaller of line 1 or line 6	7	<u>40,400.</u>
8	Enter the smaller of line 5 or line 7	8	<u>40,400.</u>
9	Subtract line 8 from line 7 (this amount taxed at 0%)	9	<u>0.</u>
10	Enter the smaller of line 1 or line 4	10	<u>7,589.</u>
11	Enter the amount from line 9	11	<u>0.</u>
12	Subtract line 11 from line 10.	12	<u>7,589.</u>
13	Enter: \$445,850 if single, \$250,800 if married filing separately, \$501,600 if married filing jointly or qualifying widow(er), \$473,750 if head of household.	13	<u>445,850.</u>
14	Enter the smaller of line 1 or line 13	14	<u>196,172.</u>
15	Add lines 5 and 9	15	<u>188,583.</u>
16	Subtract line 15 from line 14. If zero or less, enter -0-	16	<u>7,589.</u>
17	Enter the smaller of line 12 or line 16	17	<u>7,589.</u>
18	Multiply line 17 by 15% (0.15)	18	<u>1,138.</u>
19	Add lines 9 and 17	19	<u>7,589.</u>
20	Subtract line 19 from line 10	20	<u>0.</u>
21	Multiply line 20 by 20% (0.20)	21	<u>0.</u>
22	Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet.	22	<u>41,174.</u>
23	Add lines 18, 21, and 22	23	<u>42,312.</u>
24	Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet.	24	<u>43,602.</u>
25	Tax on all taxable income. Enter the smaller of line 23 or line 24 here and on Form 1040 or 1040-SR, line 16.	25	<u>42,312.</u>

Form 1099-B Worksheet

▶ Keep for your records

2021

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution ▶ Robinhood Securities LLC
Acct Number ▶ 164958803 **Reporter's Tax ID** . . . ▶ 38-4019216

Owner of account ▶
Transactions were not reported to IRS ▶

Form 8949 Reporting Exception Transactions		
Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.		
	Proceeds	Cost Basis
Box A transactions to report directly on Sch D, Line 1a (short term)		
Box D transactions to report directly on Sch D, Line 8a (long term)		
(Do not duplicate any transactions summarized above when making entries in the table below.)		

Brokerage Statement (Form 1099-B or substitute) Summary Table						
Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	277,295.05	225,308.61	51,986.44	2,065.44	54,051.88	W
Short term sales with cost basis reported to the IRS						
Box D	18,498.05	11,075.25	7,422.80	0.00	7,422.80	
Long term sales with cost basis reported to the IRS						
Totals	295,793.10	236,383.86	59,409.24	2,065.44	61,474.68	

Form 8949 and Schedule D Totals						
Totals gains/losses as they will appear on Form 8949 and Schedule D.						
Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)						
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)	
Sch D, Line 1a	261,890.36	205,959.72			55,930.64	
Form 8949, Box A	15,405.00	19,349.00	2,065.00	W	-1,879.00	
Form 8949, Box B						
Form 8949, Box C						
Sch D, Line 8a	18,498.05	11,075.25			7,422.80	
Form 8949, Box D						
Form 8949, Box E						
Form 8949, Box F						

Total Federal Backup Withholding _____
State ID
 State Backup Withholding _____

 Total State Backup Withholding _____

Total Collectible Gain	Total Gain	Excluded Gain	Net Gain
Qualified Small Business (QSB) gain (Sec 1202)			
Maximum 50% exclusion gain ▶			
Maximum 60% exclusion gain ▶			
Maximum 75% exclusion gain ▶			
Maximum 100% exclusion gain ▶			

PDF Attachment
 Taxpayer must mail in a statement with more details? Yes No
 If yes, you'll need to submit a copy of your 1099-B to the IRS to provide documentation for some of the transactions on your sales summary.

Name(s) Shown on Return
 Arpan Kundu

Social Security No.
 736-07-2154

Name of reporting financial institution ▶ Robinhood Securities LLC
 Acct Number ▶ 164958803 Reporter's Tax ID . . . ▶ 38-4019216

Owner of account ▶
 Transactions were not reported to IRS ▶

Quick Entry Table										
If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet. (See field help for more details.)										
Sale#	Property Description		Date Sold	Date Acquired	Sales Price (Proceeds)	Cost or Other Basis	Disallowed Wash Sale			
Adjustment Amount	Adjustment Code(s)	Holding Period	Basis Reported to IRS?		Reported on Form 1099B?					
Additional fields for use by Step-by-Step and Import only (See help)										
1	STNG	07/16/2021 PUT	\$12.00	1	Check here if this summarizes multiple sales. . . . ▶					
A		01/05/21	01/04/21	-35.02	0.00	0.00				
		S		Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ▶ <input type="checkbox"/> 0										
				0.00					X	
2	88160R101	TESLA, INC. COMMON STOCK	10	Check here if this summarizes multiple sales. . . . ▶						
A		01/07/21	VARIOUS	8,024.83	1,883.17	0.00				
		S		Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ▶ <input type="checkbox"/> 0										
				0.00					X	
3	STNG	02/19/2021 CALL	\$15.00	10	Check here if this summarizes multiple sales. . . . ▶					
A		01/08/21	01/07/21	-100.03	0.00	0.00				
		S		Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ▶ <input type="checkbox"/> 0										
				0.00					X	
4	FUBO	01/08/2021 PUT	\$20.00	1	Check here if this summarizes multiple sales. . . . ▶					
A		01/08/21	01/08/21	77.98	0.00	0.00				
		S		Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ▶ <input type="checkbox"/> 0										
				0.00					X	
				See TQUICK	Check here if this summarizes multiple sales. . . . ▶					
				Yes		No	Yes		No	
Check to use worksheet (see help) ▶ <input type="checkbox"/>										
Sale(s) missing info?										

Sale Results								
#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	A	STNG 07/16/2021 PUT \$12.00 1	-35.02	0.00			-35.02	S
2	A	Form 8949 exception/ reported on Sch D Line 1a	8,024.83	1,883.17	BYPASS8949		6,141.66	S
3	A	STNG 02/19/2021 CALL \$15.00 10	-100.03	0.00			-100.03	S
4	A	Form 8949 exception/ reported on Sch D Line 1a	77.98	0.00	BYPASS8949		77.98	S
5	A	Form 8949 exception/ reported on Sch D Line 1a	47.98	0.00	BYPASS8949		47.98	S
6	A	Form 8949 exception/ reported on Sch D Line 1a	113.96	0.00	BYPASS8949		113.96	S
7	A	Form 8949 exception/ reported on Sch D Line 1a	8,810.90	1,982.65	BYPASS8949		6,828.25	S
8	A	Form 8949 exception/ reported on Sch D Line 1a	309.98	520.00	BYPASS8949		-210.02	S
9	A	Form 8949 exception/ reported on Sch D Line 1a	0.00	260.00	BYPASS8949		-260.00	S
10	A	Form 8949 exception/ reported on Sch D Line 1a	0.00	70.00	BYPASS8949		-70.00	S
11	A	Form 8949 exception/ reported on Sch D Line 1a	148.98	0.00	BYPASS8949		148.98	S
12	A	Form 8949 exception/ reported on Sch D Line 1a	156.98	0.00	BYPASS8949		156.98	S
13	A	Form 8949 exception/ reported on Sch D Line 1a	129.98	0.00	BYPASS8949		129.98	S
14	A	Form 8949 exception/ reported on Sch D Line 1a	44.98	0.00	BYPASS8949		44.98	S
15	A	Form 8949 exception/ reported on Sch D Line 1a	72.98	0.00	BYPASS8949		72.98	S
16	A	Form 8949 exception/ reported on Sch D Line 1a	434.96	0.00	BYPASS8949		434.96	S
17	A	Form 8949 exception/ reported on Sch D Line 1a	102.98	0.00	BYPASS8949		102.98	S
18	A	Form 8949 exception/ reported on Sch D Line 1a	189.92	0.00	BYPASS8949		189.92	S
19	A	Form 8949 exception/ reported on Sch D Line 1a	575.97	0.00	BYPASS8949		575.97	S
		See RQUICK						

Name(s) Shown on Return Arpan Kundu	Social Security No. 736-07-2154
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Brokerage Statement (Form 1099-B or substitute) Summary Table						
<i>Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.</i>						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	277,295.05	225,308.61	51,986.44	2,065.44	54,051.88	W
Short term sales with cost basis reported to the IRS						
Box D	18,498.05	11,075.25	7,422.80	0.00	7,422.80	
Long term sales with cost basis reported to the IRS						
Totals	295,793.10	236,383.86	59,409.24	2,065.44	61,474.68	

Form 8949 and Schedule D Totals					
<i>Totals gains/losses as they will appear on Form 8949 and Schedule D.</i>					
<i>Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)</i>					
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a	261,890.36	205,959.72			55,930.64
Form 8949, Box A	15,405.00	19,349.00	2,065.00	W	-1,879.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a	18,498.05	11,075.25			7,422.80
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

PDF Attachment

Taxpayer must mail in a statement with more details? Yes No

Form 1099-B Worksheet

► Keep for your records

2021

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution ► VANGUARD MARKETING CORPORATION
Acct Number ► 41847691 Reporter's Tax ID ► 23-2019846

Owner of account ►
Transactions were not reported to IRS ►

Form 8949 Reporting Exception Transactions		
Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.		
	Proceeds	Cost Basis
Box A transactions to report directly on Sch D, Line 1a (short term)		
Box D transactions to report directly on Sch D, Line 8a (long term)		
(Do not duplicate any transactions summarized above when making entries in the table below.)		

Brokerage Statement (Form 1099-B or substitute) Summary Table						
Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	73,202.79	74,225.76	-1,022.97	12.40	-1,010.57	W
Short term sales with cost basis reported to the IRS						
Totals	73,202.79	74,225.76	-1,022.97	12.40	-1,010.57	

Form 8949 and Schedule D Totals					
Totals gains/losses as they will appear on Form 8949 and Schedule D.					
Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)					
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	73,202.00	74,228.00	12.00	W	-1,014.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

Total Federal Backup Withholding _____
 State Backup Withholding _____ **State ID** _____

 Total State Backup Withholding _____

Total Collectible Gain	Total Gain	Excluded Gain	Net Gain
Qualified Small Business (QSB) gain (Sec 1202)			
Maximum 50% exclusion gain ►			
Maximum 60% exclusion gain ►			
Maximum 75% exclusion gain ►			
Maximum 100% exclusion gain ►			

PDF Attachment
 Taxpayer must mail in a statement with more details? Yes No
 If yes, you'll need to submit a copy of your 1099-B to the IRS to provide documentation for some of the transactions on your sales summary.

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution ▶ VANGUARD MARKETING CORPORATION
Acct Number ▶ 41847691 Reporter's Tax ID . . . ▶ 23-2019846

Owner of account ▶
Transactions were not reported to IRS ▶

Quick Entry Table										
If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet. (See field help for more details.)										
Sale#	Property Description		Date Sold	Date Acquired	Sales Price (Proceeds)	Cost or Other Basis	Disallowed Wash Sale			
Adjustment Amount	Adjustment Code(s)	Holding Period	Basis Reported to IRS?		Reported on Form 1099B?					
Additional fields for use by Step-by-Step and Import only (See help)										
1	86887Q109	SURO CAPITAL CORP 100	01/06/21	09/30/20	1,333.97	1,187.26	0.00			
A					Yes X	No	Yes X	No		
Check to use worksheet (see help) ▶ 0										
0.00										
X										
2	76156B107	REVOLVE GROUP INC A 200	01/08/21	08/03/20	6,687.85	3,300.00	0.00			
A					Yes X	No	Yes X	No		
Check to use worksheet (see help) ▶ 0										
0.00										
X										
3	655664100	NORDSTROM INC 100	01/08/21	09/30/20	3,248.93	1,206.50	0.00			
A					Yes X	No	Yes X	No		
Check to use worksheet (see help) ▶ 0										
0.00										
X										
4	881608103	TESORO ENTERPRISES INC 100	01/11/21	12/07/20	17.00	29.40	12.40			
A					Yes X	No	Yes X	No		
Check to use worksheet (see help) ▶ 0										
0.00										
X										
		See QUICK								
Check here if this summarizes multiple sales. . . . ▶										
					Yes	No	Yes	No		
Check to use worksheet (see help) ▶										
Sale(s) missing info?										

Sale Results								
#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1A		86887Q109 SURO CAPITAL CORP 100	1,333.97	1,187.26			146.71	S
2A		76156B107 REVOLVE GROUP INC A 200	6,687.85	3,300.00			3,387.85	S
3A		655664100 NORDSTROM INC 100	3,248.93	1,206.50			2,042.43	S
4A		881608103 TESORO ENTERPRISES INC 100	17.00	29.40	W	12.40	0.00	S
5A		ALL UPWORK INC 540 EX P 01/15/21	39.00	0.00			39.00	S
6A		ALL PALANTIR TECHS 530 EXP 01/15/21 INC CL A 3	72.00	0.00			72.00	S
7A		7542C130 SCORPIO TANKERS INC NEW 500	5,965.87	6,750.00			-784.13	S
8A		76156B107 REVOLVE GROUP INC A 15	565.36	257.10			308.26	S
9A		687033100 GROCO RESOURCE CORP 1000	1,481.97	1,520.00			-38.03	S
10A		08862E109 BEYOND MEAT INC 25	4,001.97	3,143.53			858.44	S
11A		86887Q109 SURO CAPITAL CORP 105	1,593.32	1,274.53			318.79	S
12A		7542C130 SCORPIO TANKERS INC NEW 89	1,093.79	1,201.50			-107.71	S
13A		7542C130 SCORPIO TANKERS INC NEW 200	2,459.95	2,610.89			-150.94	S
14A		ALL SCORPIO TANKERS INC 815 EXP 01/19/21 NEW 8	-24.01	0.00			-24.01	S
15A		7542C130 SCORPIO TANKERS INC NEW 200	3,173.93	2,193.89			980.04	S
16A		7542C130 SCORPIO TANKERS INC NEW 400	6,103.87	4,361.62			1,742.25	S
17A		7542C130 SCORPIO TANKERS INC NEW 100	1,593.79	1,066.50			527.29	S
18A		7542C130 SCORPIO TANKERS INC NEW 50	917.51	530.84			386.67	S
19A		55343B104 NEXTTECH AR SOLUTIONS 240	818.40	1,350.72			-532.32	S
		See QUICK						

Name(s) Shown on Return Arpan Kundu	Social Security No. 736-07-2154
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Brokerage Statement (Form 1099-B or substitute) Summary Table						
<i>Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.</i>						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	73,202.79	74,225.76	-1,022.97	12.40	-1,010.57	W
Short term sales with cost basis reported to the IRS						
Totals	73,202.79	74,225.76	-1,022.97	12.40	-1,010.57	

Form 8949 and Schedule D Totals					
<i>Totals gains/losses as they will appear on Form 8949 and Schedule D.</i>					
<i>Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)</i>					
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	73,202.00	74,228.00	12.00	W	-1,014.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

PDF Attachment
Taxpayer must mail in a statement with more details? Yes No

Form 1099-B Worksheet

▶ Keep for your records

2021

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution ▶ E*TRADE SECURITIES LLC
Acct Number ▶ 5505-6366 **Reporter's Tax ID** . . . ▶ 35-2167612

Owner of account ▶
 Transactions were not reported to IRS ▶

Form 8949 Reporting Exception Transactions		
Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.		
	Proceeds	Cost Basis
Box A transactions to report directly on Sch D, Line 1a (short term)		
Box D transactions to report directly on Sch D, Line 8a (long term)		
(Do not duplicate any transactions summarized above when making entries in the table below.)		

Brokerage Statement (Form 1099-B or substitute) Summary Table						
Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	22,866.69	15,820.20	7,046.49		7,046.49	
Short term sales with cost basis reported to the IRS						
Box B	2,865.34	11.00	2,854.34		2,854.34	
Short term sales with cost basis NOT reported to the IRS						
Totals	25,732.03	15,831.20	9,900.83		9,900.83	

Form 8949 and Schedule D Totals						
Totals gains/losses as they will appear on Form 8949 and Schedule D.						
Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)						
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)	
Sch D, Line 1a						
Form 8949, Box A	22,866.00	15,820.00			7,046.00	
Form 8949, Box B	2,865.00	11.00			2,854.00	
Form 8949, Box C						
Sch D, Line 8a						
Form 8949, Box D						
Form 8949, Box E						
Form 8949, Box F						

Total Federal Backup Withholding _____
 State Backup Withholding _____ **State ID** _____

 Total State Backup Withholding _____

Total Collectible Gain	Total Gain	Excluded Gain	Net Gain
Qualified Small Business (QSB) gain (Sec 1202)			
Maximum 50% exclusion gain ▶			
Maximum 60% exclusion gain ▶			
Maximum 75% exclusion gain ▶			
Maximum 100% exclusion gain ▶			

PDF Attachment
 Taxpayer must mail in a statement with more details? Yes No
 If yes, you'll need to submit a copy of your 1099-B to the IRS to provide documentation for some of the transactions on your sales summary.

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution E*TRADE SECURITIES LLC
Acct Number 5505-6366 Reporter's Tax ID 35-2167612

Owner of account
Transactions were not reported to IRS

Quick Entry Table

If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet.

Table with columns: Sale#, Property Description, Date Sold, Date Acquired, Sales Price (Proceeds), Cost or Other Basis, Disallowed Wash Sale, Adjustment Amount, Adjustment Code(s), Holding Period, Basis Reported to IRS?, Reported on Form 1099B?. Includes entries for Intel Corp sales.

Sale Results

Summary table with columns: #, 8949 Box, Description, Sale Proceeds, Cost Basis, Adj. Code(s), Adjustment Amount, Gain or (Loss), S/L. Lists results for sales 1 through 6.

Name(s) Shown on Return Arpan Kundu	Social Security No. 736-07-2154
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Brokerage Statement (Form 1099-B or substitute) Summary Table						
<i>Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.</i>						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	22,866.69	15,820.20	7,046.49		7,046.49	
Short term sales with cost basis reported to the IRS						
Box B	2,865.34	11.00	2,854.34		2,854.34	
Short term sales with cost basis NOT reported to the IRS						
Totals	25,732.03	15,831.20	9,900.83		9,900.83	

Form 8949 and Schedule D Totals						
<i>Totals gains/losses as they will appear on Form 8949 and Schedule D.</i>						
<i>Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)</i>						
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)	
Sch D, Line 1a						
Form 8949, Box A	22,866.00	15,820.00			7,046.00	
Form 8949, Box B	2,865.00	11.00			2,854.00	
Form 8949, Box C						
Sch D, Line 8a						
Form 8949, Box D						
Form 8949, Box E						
Form 8949, Box F						

PDF Attachment
 Taxpayer must mail in a statement with more details? Yes No

Form 1099-B Worksheet

▶ Keep for your records

2021

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution ▶ Voyager digital
Acct Number ▶ _____ Reporter's Tax ID . . . ▶ _____

Owner of account ▶ _____
Transactions were not reported to IRS ▶

Form 8949 Reporting Exception Transactions		
Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.		
	Proceeds	Cost Basis
Box A transactions to report directly on Sch D, Line 1a (short term)		
Box D transactions to report directly on Sch D, Line 8a (long term)		
(Do not duplicate any transactions summarized above when making entries in the table below.)		

Brokerage Statement (Form 1099-B or substitute) Summary Table						
Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box C	11,637.64	13,757.47	-2,119.83		-2,119.83	
Short term sales not reported to the IRS						
Totals	11,637.64	13,757.47	-2,119.83		-2,119.83	

Form 8949 and Schedule D Totals					
Totals gains/losses as they will appear on Form 8949 and Schedule D.					
Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)					
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A					
Form 8949, Box B					
Form 8949, Box C	11,637.00	13,757.00			-2,120.00
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

Total Federal Backup Withholding _____
State ID
 State Backup Withholding _____

 Total State Backup Withholding _____

Total Collectible Gain	Total Gain	Excluded Gain	Net Gain
Qualified Small Business (QSB) gain (Sec 1202)			
Maximum 50% exclusion gain ▶			
Maximum 60% exclusion gain ▶			
Maximum 75% exclusion gain ▶			
Maximum 100% exclusion gain ▶			

PDF Attachment
 Taxpayer must mail in a statement with more details? Yes No
 If yes, you'll need to submit a copy of your 1099-B to the IRS to provide documentation for some of the transactions on your sales summary.

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

Name of reporting financial institution ▶ Voyager digital
Acct Number ▶ _____ Reporter's Tax ID . . . ▶ _____

Owner of account ▶ _____
Transactions were not reported to IRS ▶

Quick Entry Table										
If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet. (See field help for more details.)										
Sale#	Property Description			Sales Price (Proceeds)	Cost or Other Basis	Disallowed Wash Sale				
8949 Box	Date Sold	Date Acquired				Reported on Form 1099B?				
Adjustment Amount	Adjustment Code(s)	Holding Period	Basis Reported to IRS?							
<i>Additional fields for use by Step-by-Step and Import only (See help)</i>										
<input type="checkbox"/>	1	3121.55 of DGB	Check here if this summarizes multiple sales. . . . ▶							
C	09/03/21	01/09/21	207.41	100.00						
		S	Yes		X	No	Yes		X No	
Check to use worksheet (see help) ▶ CRYPTOC										
<input checked="" type="checkbox"/>	2	16878.45 of DGB	Check here if this summarizes multiple sales. . . . ▶							
C	09/03/21	01/09/21	1,121.49	552.79						
		S	Yes		X	No	Yes		X No	
Check to use worksheet (see help) ▶ CRYPTOC										
<input checked="" type="checkbox"/>	3	13654.53 of DGB	Check here if this summarizes multiple sales. . . . ▶							
C	09/12/21	01/09/21	772.84	447.21						
		S	Yes		X	No	Yes		X No	
Check to use worksheet (see help) ▶ CRYPTOC										
<input checked="" type="checkbox"/>	4	10488.25 of DGB	Check here if this summarizes multiple sales. . . . ▶							
C	09/12/21	02/05/21	593.63	400.00						
		S	Yes		X	No	Yes		X No	
Check to use worksheet (see help) ▶ CRYPTOC										
<input checked="" type="checkbox"/>		See TQUICK	Check here if this summarizes multiple sales. . . . ▶							
			Yes			No	Yes		No	
Check to use worksheet (see help) ▶										
Sale(s) missing info?										

Sale Results								
#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	C	3121.55 of DGB	207.41	100.00			107.41	S
2	C	16878.45 of DGB	1,121.49	552.79			568.70	S
3	C	13654.53 of DGB	772.84	447.21			325.63	S
4	C	10488.25 of DGB	593.63	400.00			193.63	S
5	C	2488.08 of DGB	140.82	100.00			40.82	S
6	C	11017.00 of DGB	623.56	500.00			123.56	S
7	C	4837.29 of DGB	273.79	250.00			23.79	S
8	C	2514.85 of DGB	142.34	130.98			11.36	S
9	C	200.00 of DGB	10.20	10.42			-0.22	S
10	C	2085.30 of DGB	99.80	108.61			-8.81	S
11	C	7634.97 of DGB	365.40	500.00			-134.60	S
12	C	8964.29 of DGB	429.02	500.00			-70.98	S
13	C	2969.63 of DGB	142.12	250.00			-107.88	S
14	C	12863.03 of DGB	615.61	1,100.00			-484.39	S
15	C	1169.24 of DGB	55.96	100.00			-44.04	S
16	C	6281.88 of DGB	300.64	500.00			-199.36	S
17	C	9338.48 of DGB	446.93	500.00			-53.07	S
18	C	9449.61 of DGB	452.25	500.00			-47.75	S
19	C	3948.47 of DGB	188.97	200.00			-11.03	S
		See RQUICK						

Name(s) Shown on Return Arpan Kundu	Social Security No. 736-07-2154
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Brokerage Statement (Form 1099-B or substitute) Summary Table						
<i>Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.</i>						
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box C	11,637.64	13,757.47	-2,119.83		-2,119.83	
Short term sales not reported to the IRS						
Totals	11,637.64	13,757.47	-2,119.83		-2,119.83	

Form 8949 and Schedule D Totals					
<i>Totals gains/losses as they will appear on Form 8949 and Schedule D.</i>					
<i>Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)</i>					
Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A					
Form 8949, Box B					
Form 8949, Box C	11,637.00	13,757.00			-2,120.00
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

PDF Attachment

Taxpayer must mail in a statement with more details? Yes No

IRA Contributions Worksheet

2021

▶ Keep for your records

Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security Number <u>736-07-2154</u>
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Traditional IRA Contributions

Regular Traditional IRA Contributions		Taxpayer	Spouse
1	Enter traditional IRA contributions made for 2021, including any made between 1/1/2022 and 4/18/2022, any amounts later recharacterized to a Roth IRA, and any excess contributions, but not including any rollovers. Also include any contributions to deemed IRAs under an employer plan		
2	Contributions recharacterized from a Roth IRA (from line 24) . . .		
3	Traditional IRA contributions, from Schedule(s) K-1		
4	Contributions recharacterized (not converted) to a Roth IRA . . .		
▶	If there is a recharacterization indicated on line 4, an explanation must be attached to the tax return.		
5	Traditional IRA contributions. Combine lines 1 through 4		
6	Enter any contribution included on line 5 withdrawn before the due date of the tax return. <i>See Help</i>		
7	Excess traditional IRA contribution credit.		
8	Repayments of qualified reservist distributions		
9	Total traditional IRA contributions.		
Additional Traditional IRA Contribution Information		Taxpayer	Spouse
10	Check if covered by a retirement plan at work. If married filing a separate return, check box in spouse column, if applicable . . .	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	Enter any contributions included on line 9 that were made during 1/1/2022 to 4/18/2022 (<i>See Help</i>).		
Deductible and Non-deductible Traditional IRA Contributions		Taxpayer	Spouse
12	Deductible traditional IRA contributions from worksheet		
13	Nondeductible traditional IRA contributions from worksheet.		
	QuickZoom to worksheet indicated by the check: <input type="checkbox"/> IRA deduction worksheet ▶ <input type="checkbox"/> Worksheet for social security recipients ▶		
14	Amount on line 13 you elect to make nondeductible		
15	Excess traditional IRA contributions, to Form 5329, line 15 Note: You may avoid a penalty by withdrawing the amount on line 15 before due date of return, including extensions.		
16	Deductible traditional IRA contributions, to Schedule 1 (Form 1040), Line 19.		
17	Qualified reservist repayments		
18	Nondeductible traditional IRA contributions, to Form 8606, ln 1. . .		

IRA Contributions Worksheet

2021

▶ Keep for your records

Arpan Kundu

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Roth IRA Contributions

Regular Roth IRA Contributions		Taxpayer	Spouse
19	Enter regular Roth IRA contributions made for 2021, including any made between 1/1/2022 and 4/18/2022, any amounts later recharacterized to a traditional IRA, and any excess contributions, but not including any rollovers or conversions. Also include any contributions to deemed Roth IRAs under an employer plan.	_____	_____
20	Contributions recharacterized from a traditional IRA, (from In 4). . .	_____	_____
21	Roth IRA contributions, from Schedule(s) K-1.	_____	_____
22	Enter contributions recharacterized to a traditional IRA.	_____	_____
▶	If there is a recharacterization indicated on line 23, an explanation must be attached to the tax return.		
23	Disallowed Roth IRA conversions	_____	_____
24	Roth IRA contributions. Combine lines 20 through 23	_____	_____
25	Enter any contribution included on line 24 withdrawn before the due date of the tax return. <i>See Help</i>	_____	_____
26	Excess Roth IRA contribution credit	_____	_____
27	Total Roth IRA contributions	_____	_____
28	Repayments of qualified Roth reservist distributions	_____	_____

Roth IRA Contributions After Limitations		Taxpayer	Spouse
29	Roth IRA contributions after limitation	_____	_____
30	Excess Roth IRA contributions, to Form(s) 5329, line 23	_____	_____
	Note: <i>You may avoid a penalty by withdrawing the amount on line 31 before due date of return, including extensions.</i>		

Coverdell Education Savings Account (Education IRA) Contributions

Excess Coverdell Education Savings Account Contributions		Taxpayer	Spouse
31	Enter any excess contributions made to Coverdell Education Savings Accounts (ESAs) of which you are the beneficiary.	_____	_____
	Note: <i>You do not need to report any Coverdell ESA contributions which are not excess contributions..</i>		

Name(s) Shown on Return
Arpan Kundu

Social Security Number
736-07-2154

Tax Deductions

1 State and local taxes:

Optional Sales Tax Tables

a Available Income:

(1) Income from Form 1040, line 7	209,022.
(2) Nontaxable income entered elsewhere on return	_____
(3) Available income: 2020 refundable credits in excess of tax	0.
(4) Enter any additional nontaxable income	_____
(5) Total available income	209,022.

b Sales Tax Per State of Residence:

Enter state in column (1), then enter total (combined) state and local sales tax rate in column (4).

Arizona, Colorado, Louisiana, Mississippi, New York or South Carolina only:

Double-click in column (4) to select your locality for each state entered.

(1) State	(2) Date Lived in State From	(3) Date Lived in State To	(4) Enter Total State & Local Rate (%)	(5) State Sales Tax Rate (%)	(6) Local Sales Tax Rate (%) (4) - (5)	(7) State Sales Tax Table Amount	(8) Local Sales Tax Amount	(9) Prorated or Total Amount

c Total general sales tax using tables _____

d Sales Tax Paid on Specific Items (see help):

(1) ST	(2) Total State & Local Rate	(3) Description	(4) Type	(5) Cost	(6) Rate if Different	(7) Actual Sales Tax Amount Paid	(8) Specific Item Deduction

e Total sales tax deduction on specific items _____

f Total general sales tax per tables plus sales tax on specific items _____

g Actual State and Local General Sales Tax:

Actual sales taxes (enter the total sales taxes paid during the year on all items). _____

h State and Local Income Taxes:

State and Local Income taxes 9,445.00

i State and Local Tax Deduction to Schedule A, line 5a:

Greater of line 1f, line 1g, or line 1h (to Schedule A, line 5a). 9,445.00

j Check a box to choose to use income taxes paid, sales taxes paid, or whichever provides the greater deduction:

Income Taxes . . Sales Taxes Greater amount .

2 State and local real estate taxes:

a Real estate taxes paid on principal residence **not** entered on Form 1098 _____

- b Real estate taxes paid on principal residence entered on Home Mortgage Int. Wks . . . _____
- c Real estate taxes paid on additional homes or land _____
 Personal portion of real estate taxes from Schedule E Worksheet for:
 - d Principal residence _____
 - e Vacation home _____
 - f Less real estate taxes deducted on Form 8829 _____
 - g Foreign real propety taxes included in lines 2a-2f above _____
 - h Add lines 2a through 2f, less line 2g (to Schedule A, line 5b) _____
- 3 State and local personal property taxes:**
 - a Auto registration fees based on the value of the vehicle.
 2020 Amount Enter 2021 description:
 131.21 Toyota Avalon 2006 _____
 _____ _____
 _____ _____
 - b Non-business portion of personal property taxes from Car & Truck Exp Wks _____
 - c Other personal property taxes _____
 - d Add lines 3a through 3c (to Schedule A, line 5c) _____
- 4 Other taxes:**
 - a Other taxes from Schedule(s) K-1 _____
 - b Foreign taxes from interest and dividends _____
 - c Foreign taxes from Schedule(s) K-1 _____
 - d Other foreign taxes (not used to claim a foreign tax credit). _____
 - e Other taxes.
 2020 Amount Enter 2021 description:
 _____ _____
 _____ _____
 _____ _____
 - f Foreign real propety taxes included in lines 4a-4e above _____
 - g Add lines 4a through 4e, less line 4f (to Schedule A, line 6) _____

Interest Deductions

- 5 Home mortgage interest and points reported on Form 1098:**
 - a Mortgage interest and points from the Home Mortgage Interest Worksheet _____
 - b Qualified mortgage interest from Schedule E Worksheet _____
 - c Less home mortgage interest/points deducted on Form 8829 _____
 - d Less home mortgage interest from Form 8396, line 3 _____
 - e Add lines 5a through 5d (to Sch A, line 8a) or line A2 from above. _____
- 6 Home mortgage interest not reported on Form 1098:**
 - a Mortgage interest from the Home Mortgage Interest Worksheet. _____
 - b Less home mortgage interest deducted on Form 8829 _____
 - c Add lines 6a and 6b (to Sch A, line 8b) or line B2 from above _____
- 7 Points not reported on Form 1098:**
 - a Amortizable points from the Home Mortgage Interest Worksheet _____
 - b Other points not on Form 1098 from the Home Mortgage Interest Worksheet _____
 - c Less points deducted on Form 8829 _____
 - d Add lines 7a through 7c (to Schedule A, line 8c) or line C2 from above. _____

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State and Local Income Taxes

State income taxes:		
1	State income tax withheld	1 3,631.
2	2021 state estimated taxes paid in 2021	2
3	2020 state estimated taxes paid in 2021	3
4	Amount paid with 2020 state application for extension	4
5	Amount paid with 2020 state income tax return	5 5,814.
6	Overpayment on 2020 state income tax return applied to 2021 tax	6
7	Other amounts paid in 2021 (amended returns, installment payments, etc.)	7
8	State estimated tax from Schedule(s) K-1 (Form 1041)	8
Local income taxes:		
9	Local income tax withheld	9
10	2021 local estimated taxes paid in 2021	10
11	2020 local estimated taxes paid in 2021	11
12	Amount paid with 2020 local application for extension	12
13	Amount paid with 2020 local income tax return	13
14	Overpayment on 2020 local income tax return applied to 2021 tax	14
15	Other amounts paid in 2021 (amended returns, installment payments, etc.)	15
16	Local estimated tax from Schedule(s) K-1 (Form 1041)	16
Other:		
17		17
18	Total Add lines 1 through 17	18 9,445.
19	State and local refund allocated to 2021	19
20	Nondeductible state income tax from line 28	20
21	Total reductions Add lines 19 and 20	21
22	Total state and local income tax deduction Line 18 less line 21	22 9,445.

Nondeductible State Income Tax (Hawaii Only)

23	Nontaxable federal employee cost of living allowance	23
24	Adjusted gross income	24
25	Add lines 23 and 24	25
26	Nondeductible percent. Line 23 divided by line 25	26 %
27	Hawaii state income tax included in line 18	27
28	Nondeductible Hawaii state income tax. Multiply line 26 by line 27.	28

Charitable Deduction Limits Worksheet For Current Year Contributions

2021

► Keep for your records

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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Step 1 – Enter your other charitable contributions made during the year.

1 Enter your cash contributions to 100% limit organizations	1	
2 Enter your contributions of capital gain property "for the use of" any qualified organization	2	
3 Enter your other contributions "for the use of" any qualified organization. Don't include any contributions you entered on a previous line	3	
4 Enter your other contributions to qualified organizations that aren't 50% limit organizations. Don't include any contributions you entered on a previous line	4	
5 Enter your contributions of capital gain property to 50% limit organizations deducted at fair market value. Don't include any contributions you entered on a previous line.	5	
6 Enter your noncash contributions to 50% limit organizations other than capital gain property you deducted at fair market value. Be sure to include contributions of capital gain property to 50% limit organizations if you reduced the property's fair market value. Don't include any contributions you entered on a previous line	6	
7 Enter your cash contributions to 50% limit organizations. Don't include any contributions you entered on a previous line	7	

Step 2 – Figure your deduction for the year (if any result is zero or less, enter -0-)

8 Enter your adjusted gross income (AGI)	8	209,022.
--	---	----------

A Cash contributions subject to the limit based on 60% of AGI

(If line 7 is zero, leave lines 9 through 11 blank)

9 Multiply line 8 by 0.6	9	
10 Deductible amount. Enter the smaller of line 7 or line 9.	10	
11 Carryover. Subtract line 10 from line 7.	11	

B Noncash contributions subject to the limit based on 50% of AGI

(If line 6 is zero, leave lines 12 through 15 blank)

12 Multiply line 8 by 0.5	12	
13 Subtract line 10 from line 12	13	
14 Deductible amount. Enter the smaller of line 6 or line 13	14	
15 Carryover. Subtract line 14 from line 6.	15	

C Contributions (other than capital gain property) subject to limit based on 30% of AGI

(If lines 3 and 4 are both zero, leave lines 16 through 22 blank)

16 Multiply line 8 by 0.5	16	
17 Add lines 5, 6, and 7	17	
18 Subtract line 17 from line 16	18	
19 Multiply line 8 by 0.3	19	
20 Add lines 3 and 4	20	
21 Deductible amount. Enter the smallest of line 18, 19, or 20	21	
a Cash portion of deductible amount - for Sch A line 11	a	
b Non-cash portion of deductible amount - for Sch A line 12.	b	
22 Carryover. Subtract line 21 from line 20	22	

D Contributions of capital gain property subject to limit based on 30% of AGI

(If line 5 is zero, leave lines 23 through 28 blank)

23 Multiply line 8 by 0.5	23	
24 Add lines 6 and 7	24	
25 Subtract line 24 from line 23	25	
26 Multiply line 8 by 0.3	26	
27 Deductible amount. Enter the smallest of line 5, 25, or 26	27	
28 Carryover. Subtract line 27 from line 5.	28	

E Contributions subject to the limit based on 20% of AGI

(If line 2 is zero, leave lines 29 through 37 blank)

29	Multiply line 8 by 0.5	29		
30	Add lines 10, 14, 21, and 27	30		
31	Subtract line 30 from line 29	31		
32	Multiply line 8 by 0.3	32		
33	Subtract line 21 from line 32	33		
34	Subtract line 27 from line 32	34		
35	Multiply line 8 by 0.2	35		
36	Deductible amount. Enter the smallest of line 2, 31, 33, 34, or 35	36		
37	Carryover. Subtract line 36 from line 2	37		

F Qualified contributions subject to limit based on 100% of AGI

(If line 1 is zero, leave lines 38 through 42 blank)

38	Enter the amount from line 8	38	
39	Add lines 10, 14, 21, 27, and 36	39	
40	Subtract line 39 from line 38	40	
41	Deductible amount. Enter the smaller of line 1 or line 40	41	
42	Carryover. Subtract line 41 from line 1	42	

G Deduction for the year

43	Add lines 10, 14, 21, 27, 36 and 41. Enter the total here and include the deductible amounts on Schedule A (Form 1040), line 11 or line 12 whichever is appropriate.	43	
44	Carryover to next year. Add lines 11, 15, 22, 28 and 37	44	

Note: Any amounts in the carryover column are not deductible this year but can be carried over to next year. See Carryovers, later, for more information about how you will use them next year.

Charitable Deduction Limits Worksheet For Carryover Contributions

2021

▶ Keep for your records

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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Step 1 — Enter your other charitable contributions made during the year.

1 Enter your cash contributions to 100% limit organizations	1	
2 Enter your contributions of capital gain property "for the use of" any qualified organization	2	
3 Enter your other contributions "for the use of" any qualified organization. Don't include any contributions you entered on a previous line	3	
4 Enter your other contributions to qualified organizations that aren't 50% limit organizations. Don't include any contributions you entered on a previous line	4	
5 Enter your contributions of capital gain property to 50% limit organizations deducted at fair market value. Don't include any contributions you entered on a previous line.	5	
6 Enter your noncash contributions to 50% limit organizations other than capital gain property you deducted at fair market value. Be sure to include contributions of capital gain property to 50% limit organizations if you reduced the property's fair market value. Don't include any contributions you entered on a previous line	6	
7 Enter your cash contributions to 50% limit organizations. Don't include any contributions you entered on a previous line	7	

Step 2 — Figure your deduction for the year (if any result is zero or less, enter -0-)

8 Enter your adjusted gross income (AGI)			8		209,022.
	Percentage of line 8	Used in Current Year			
a 60% AGI limit to line 9	125,413.	Less	0.	a	125,413.
b 50% AGI limit to line 12	104,511.	Less	0.	b	104,511.
c 30% AGI limit, Section C to line 19	62,707.	Less	0.	c	62,707.
d 30% AGI limit, Section D to line 26	62,707.	Less	0.	d	62,707.
e 20% AGI limit to line 35	41,804.	Less	0.	e	41,804.

A Cash contributions subject to the limit based on 60% of AGI

(If line 7 is zero, leave lines 9 through 11 blank)

9 Multiply line 8 by 0.6	9	
10 Deductible amount. Enter the smaller of line 7 or line 9	10	
11 Carryover. Subtract line 10 from line 7	11	

B Noncash contributions subject to the limit based on 50% of AGI

(If line 6 is zero, leave lines 12 through 15 blank)

12 Multiply line 8 by 0.5	12	
13 Subtract line 10 from line 12	13	
14 Deductible amount. Enter the smaller of line 6 or line 13	14	
15 Carryover. Subtract line 14 from line 6	15	

C Contributions (other than capital gain property) subject to limit based on 30% of AGI

(If lines 3 and 4 are both zero, leave lines 16 through 22 blank)

16 Multiply line 8 by 0.5	16	
17 Add lines 5, 6, and 7	17	
18 Subtract line 17 from line 16	18	
19 Multiply line 8 by 0.3	19	
20 Add lines 3 and 4	20	
21 Deductible amount. Enter the smallest of line 18, 19, or 20	21	
a Cash portion of deductible amount - for Sch A line 11	a	
b Non-cash portion of deductible amount - for Sch A line 12	b	
22 Carryover. Subtract line 21 from line 20	22	

D Contributions of capital gain property subject to limit based on 30% of AGI

(If line 5 is zero, leave lines 23 through 28 blank)

23 Multiply line 8 by 0.5	23	
24 Add lines 6 and 7	24	
25 Subtract line 24 from line 23	25	
26 Multiply line 8 by 0.3	26	
27 Deductible amount. Enter the smallest of line 5, 25, or 26	27	
28 Carryover. Subtract line 27 from line 5	28	

E Contributions subject to the limit based on 20% of AGI

(If line 2 is zero, leave lines 29 through 37 blank)

29	Multiply line 8 by 0.5	29		
30	Add lines 10, 14, 21, and 27	30		
31	Subtract line 30 from line 29	31		
32	Multiply line 8 by 0.3	32		
33	Subtract line 21 from line 32	33		
34	Subtract line 27 from line 32	34		
35	Multiply line 8 by 0.2	35		
36	Deductible amount. Enter the smallest of line 2, 31, 33, 34, or 35	36		
37	Carryover. Subtract line 36 from line 2	37		

F Qualified contributions for certain disaster relief efforts (Not applicable for carryovers)

(If line 1 is zero, leave lines 38 through 42 blank)

38	Enter the amount from line 8	38		
39	Add lines 10, 14, 21, 27, and 36	39		
40	Subtract line 39 from line 38	40		
41	Deductible amount. Enter the smaller of line 1 or line 40	41		
42	Carryover. Subtract line 41 from line 1	42		

G Deduction for the year

43	Add lines 10, 14, 21, 27, 36 and 41. Enter the total here and include the deductible amounts on Schedule A (Form 1040), line 11 or line 12 whichever is appropriate.	43		
44	Carryover to next year. Add lines 11, 15, 22, 28 and 37	44		

Note: Any amounts in the carryover column are not deductible this year but can be carried over to next year. See Carryovers, later, for more information about how you will use them next year.

Charitable Contributions Summary

2021

▶ Keep for your records

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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Part I Cash Contributions Summary

Name of Charitable Organization	(a) Total	(b) 60% Limit	(c) 30% Limit	(d) 100% Limit
Totals:				

Part II Non-Cash Contributions Summary

Name of Charitable Organization	Total	Other Property		Capital Gain Property	
	(a) Total	(b) 50% Limit	(c) 30% Limit	(d) 30% Limit	(e) 20% Limit
Totals:					

Part III Contribution Carryovers to 2022

	Total	Cash and Other Non-Capital Gain Property				Capital Gain Property	
	(a) Total	(b) 100% Limit	(c) 60% Limit	(d) 50% Limit	(e) 30% Limit	(f) 30% Limit	(g) 20% Limit
1 2021 contributions							
2 2021 contributions allowed							
3 Carryovers from:							
a 2020 tax year		N/A					
b 2019 tax year		N/A					
c 2018 tax year		N/A					
d 2017 tax year		N/A					
e 2016 tax year		N/A					
4 Carryovers allowed in 2021		N/A					
5 Carryovers disallowed in 2021		N/A					
6 Carryovers to 2022:							
a From 2021							
b From 2020		N/A					
c From 2019		N/A					
d From 2018		N/A					
e From 2017		N/A					
f From 2016		N/A					

Part IV Special Situations in Your Return for Current Year Donations

- 1 Was the **entire interest** given for all property donated to all charities? Yes No
- 2 Were **restrictions** attached to any charities's right to use or dispose of any property donated to any charity? ▶ Yes No
- 3 Did you give to anyone other than the charity the right to income from any of the donated property or to possession of any of the donated property? ▶ Yes No
- 4 Was any charity other than a 60%/50% charity? Yes No

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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FOR STATE USE ONLY: Employee Business Expenses – Subject to 2% Limitation

1 Deductible expenses from Form 2106, line 10 less deductions for performing artists and armed forces reservists claimed elsewhere	1	
2 a Qualified Educator Expenses (from Educator Expenses Worksheet)	2a	
b Educator Expense Deduction (from 1040, line 23)	2b	
c Excess Educator Expenses (line 2a less line 2b)	2c	
3 Union and professional dues	3	
4 Professional subscriptions	4	
5 Uniforms and protective clothing	5	
6 Job search costs	6	
7 Tax preparation fees	7	
8 Entertainment expenses	8	
9 Other: _____ _____ _____	9	
10 Combine lines 1 through 9	10	

FOR STATE USE ONLY:
Miscellaneous Expenses – Subject to 2% Limitation
Check the box in investment column if an investment expense

Investment
Expense ↓

11 Depreciation and amortization deductions	<input checked="" type="checkbox"/>	11	
12 Casualty/theft losses of property used in services as an employee	<input type="checkbox"/>	12	
13 REMIC expenses, from Schedule E	<input checked="" type="checkbox"/>	13	
14 Investment expenses related to interest and dividend income	<input checked="" type="checkbox"/>	14	
15 Expenses related to portfolio income, from Schedule(s) K-1	<input checked="" type="checkbox"/>	15	
16 Miscellaneous deductions, from Schedule(s) K-1	<input type="checkbox"/>	16	
17 RESERVED	<input type="checkbox"/>	17	
18 Investment counsel and advisory fees	<input checked="" type="checkbox"/>	18	
19 Certain attorney and accounting fees	<input checked="" type="checkbox"/>	19	
20 Safe deposit box rental fees	<input checked="" type="checkbox"/>	20	
21 IRA custodial fees	<input checked="" type="checkbox"/>	21	
22 Loss incurred from total distribution of all traditional IRAs	<input type="checkbox"/>	22	
23 Loss incurred from total distribution of all Roth IRAs	<input type="checkbox"/>	23	
24 Loss incurred from final distribution of a QTP investment	<input type="checkbox"/>	24	
25 Hobby expense (limited to hobby income)	<input type="checkbox"/>	25	
26 Other: a Prior year government unemployment benefits repaid in 2021	<input type="checkbox"/>	26	
b _____ _____ _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
27 Combine lines 11 through 26	<input type="checkbox"/>	27	

FOR FEDERAL AND STATE USE:
Other Miscellaneous Deductions – Not Subject to 2% Limitation

28 Expenses related to portfolio income, from Schedule(s) K-1	<input checked="" type="checkbox"/>	28	
29 Federal estate tax paid on decedent's income reported on this return	<input type="checkbox"/>	29	
30 Impairment-related expenses of a handicapped employee, from Form 2106	<input type="checkbox"/>	30	
31 Amortizable bond premiums on bonds acquired before 10/23/86	<input type="checkbox"/>	31	
32 Gambling losses	<input type="checkbox"/>	32	
33 Deduction for repayment of amounts under claim of right if over \$3,000	<input type="checkbox"/>	33	
34 Casualty/theft losses of income-producing property	<input type="checkbox"/>	34	
35 Unrecovered investment in annuity	<input type="checkbox"/>	35	
36 Ordinary loss attributable to certain debt instruments	<input type="checkbox"/>	36	
37 Net Qualified Disaster Loss	<input type="checkbox"/>	37	
38 Combine lines 28 through 37 (to Schedule A, line 16)	<input type="checkbox"/>	38	

Name(s) Shown on Return
Arpan Kundu

Social Security Number
736-07-2154

Use this worksheet **only** if someone can claim you, or your spouse if filing jointly, as a dependent.

1	Is your earned income* more than \$750? <input type="checkbox"/> Yes. Add \$350 to your earned income. Enter the total <input type="checkbox"/> No. Enter \$1,100	—▶	1	
2	Enter the amount shown below for your filing status. • Single or married filing separately — \$12,550 • Married filing jointly — \$25,100 • Head of household — \$18,800	—▶	2	12,550.
3	Standard deduction.				
3 a	Enter the smaller of line 1 or line 2. If born after January 1, 1956, and not blind, stop here and enter this amount on Form 1040 or 1040-SR, line 12. Otherwise, go to line 3b			3 a	
3 b	If born before January 2, 1956, or blind, multiply the number claimed on top of page 2 of Form 1040 Wkst by \$1,350 (\$1,700 if single or head of household)			3 b	
3 c	Add lines 3a and 3b. Enter the total here and on Form 1040 or 1040-SR, line 12			3 c	

**Earned income includes wages, salaries, tips, professional fees, and other compensation received for personal services you performed. It also includes any taxable scholarship or fellowship grant. Generally, your earned income is the total of the amount(s) you reported on Form 1040 or 1040-SR, line 1, and Schedule 1, lines 3 and 6, minus the amount, if any, on Schedule 1, line 14. Earned income, for the purpose of figuring your standard deduction, doesn't include qualified disability trust distributions.*

Earned Income Worksheet

2021

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Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security Number <u>736-07-2154</u>
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Part I – Earned Income Credit Worksheet Computation

	Taxpayer	Spouse	Total
1 If filing Schedule SE:			
a Net self-employment income	_____	_____	_____
b Optional Method and Church Employee income	_____	_____	_____
c Add lines 1a and 1b	_____	_____	_____
d One-half of self-employment tax	_____	_____	_____
e Subtract line 1d from line 1c	_____	_____	_____
2 If not required to file Schedule SE:			
a Net farm profit or (loss)	_____	_____	_____
b Net nonfarm profit or (loss)	_____	_____	_____
c Add lines 2a and 2b	_____	_____	_____
3 If filing Schedule C as a statutory employee, enter the amount from line 1 of that Schedule C	_____	_____	_____
4 Add lines 1e, 2c and 3. To EIC Wks, line 5	_____	_____	_____

Part II – Form 2441 and Standard Deduction Worksheet Computations

5 Net self-employment earnings (line 4 above)	_____	_____	_____
6 Wages, salaries, and tips less distributions from nonqualified or section 457 plans, etc	140,467.	_____	140,467.
7 a Taxable employer-provided adoption benefits	_____	_____	_____
b Foreign earned income exclusion	_____	_____	_____
8 Add lines 5 through 7b. To Form 2441, lines 18 and 19	140,467.	_____	140,467.
9 a Taxable dependent care benefits	_____	_____	_____
b Nontaxable combat pay	_____	_____	_____
10 Add lines 8, 9a & 9b. To Form 2441, lines 4 and 5	140,467.	_____	140,467.
11 Scholarship or fellowship income not on W-2	_____	_____	_____
12 SE exempt earnings less nontaxable income	_____	_____	_____
13 Distributions from nonqualified/Sec. 457 plans	_____	_____	_____
14 Add lines 5, 6, 7a, 9a and 11 through 13. To Standard Deduction Worksheet	140,467.	_____	140,467.

Part III – IRA Deduction Worksheet Computation

15 Net self-employment income or (loss)	_____	_____	_____
16 Wages, salaries, tips, etc	140,467.	_____	140,467.
17 Net self-employment loss	_____	_____	_____
18 Alimony received	_____	_____	_____
19 Nontaxable combat pay	_____	_____	_____
20 Foreign earned income exclusion	_____	_____	_____
21 Keogh, SEP or SIMPLE deduction	_____	_____	_____
22 Combine lines 15 through 21. To IRA Wks, In 2.	140,467.	_____	140,467.

Part IV – Schedule 8812 and Child Tax Credit Line 14 Worksheet Computations

23 Self-employed, church and statutory employees	_____	_____	_____
24 Wages, salaries, tips, etc	140,467.	_____	140,467.
25 Nontaxable combat pay	_____	_____	_____
26 Combine lines 23 through 25. To Schedule 8812, line 6a & Line 14 Wks, line 2.	140,467.	_____	140,467.

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Name(s) Shown on Return
Arpan Kundu

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Investment Interest Expense (Form 4952, line 1)

1	Investment interest expense, from Schedule K-1	1	
2	Investment interest expense from royalties	2	
3	Other investment interest expense:	3 a	
a	-----	b	
b	-----	c	
c	-----	d	
d	-----		
4	Total investment interest expense. Add lines 1 through 3.	4	

Gross Income from Property Held for Investment (Form 4952, line 4a)

5	Taxable investment income:		
a	From Schedule B, Interest and Dividend Income	5 a	196.
b	From Schedules K-1, Partnerships, S Corporations, Estates and Trusts	b	
c	From Form 8814, Parents' Election to Report Child's Interest and Dividends	c	
d	Total	d	196.
6	Royalty income, from Schedule E	6	
7	Net passive income from publicly traded partnerships	7	
8	Income from nonpassive trade or business without material participation	8	
9	Other investment income:	9 a	
a	-----	b	
b	-----	c	
c	-----	d	
d	-----		
10	Total investment income. Add lines 5d through 9.	10	196.

Net Capital Gain Income (Form 4952, lines 4d and 4e)

		Regular Tax	Alt Min Tax
11 a	Net gains from Schedule D, line 16	68,240.	68,240.
b	Less net gains from property not held for investment		
c	Net gains from property held for investment.	68,240.	68,240.
12 a	Net capital gains from Schedule D, lesser of ln 15 or ln 16.	7,423.	7,423.
b	Less net capital gains from property not held for investment.		
c	Net capital gains from property held for investment.	7,423.	7,423.

Investment Expenses (Form 4952, line 5)

13	Royalty expenses	13	
14	Investment expenses reported on schedule K-1 partnership or S-corp	14	
15	Expenses from nonpassive trade or business without material participation	15	
16	Other investment expenses:	16 a	
a	-----	b	
b	-----	c	
c	-----	d	
d	-----		
17	Total investment expenses. Add lines 13 through 17.	17	

Allocation of Investment Interest Expense (Schedule A, line 14)

		Regular Tax	Alt Min Tax
18	Allowed investment interest expense, Form 4952, line 8		
19	Less amount deducted on other forms and schedules:		
a	Deducted on Schedule E, page 2 for passthru entities	a	
b	Deducted on Schedule E, page 1 for royalties	b	
c	Other amounts deducted on other forms and schedules	c	
d	Total amount deducted on other forms and schedules	d	
20	Investment interest expense.	20	

► Keep for your records

Name(s) Shown on Return
Arpan Kundu

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- QuickZoom** to Schedule EIC ►
- QuickZoom** to Dependent Information Worksheet to enter qualifying children information. . . . ► _____
- QuickZoom** to Wages, Salaries, & Tips Worksheet to enter earned and non-earned income . . . ►
- QuickZoom** to page 2 of this worksheet, if credit is not calculated on line 7. ►

<p>1 Enter the amount from Form 1040 line 1 less amounts considered not earned for EIC purposes</p> <p>2 Adjustments to line 1 amount:</p> <p style="margin-left: 20px;">a Income reported as wages and as self-employment income.</p> <p style="margin-left: 20px;">b Other income entered as wages that is not considered earned income</p> <p style="margin-left: 20px;">c Distributions from section 457 and other nonqualified plans reported on W-2</p> <p>3 Subtract lines 2a, 2b and 2c from line 1</p> <p>4 a Taxpayer's nontaxable combat pay election for EIC</p> <p style="margin-left: 100px;">b Spouse's nontaxable combat pay election for EIC</p> <p style="margin-left: 20px;">c Total nontaxable combat pay election</p> <p>5 If you were self-employed or used Schedule C as a statutory employee, enter the amount from the Earned Income Worksheet, line 4</p> <p>6 Medicaid Waiver Payments reported as nontaxable</p> <p>7 Earned income. Add lines 3, 4, 5, and 6</p> <p>8 Enter the credit, from the EIC Table, for the amount on line 7. Be sure to use the correct column for filing status and number of children.</p> <p style="margin-left: 20px;">If line 8 is zero, stop. You cannot take the credit. Enter "No" on the dotted line next to Form 1040, line 27.</p> <p>9 Enter your AGI from Form 1040, line 11</p> <p>10 If you have:</p> <ul style="list-style-type: none"> ● No qualifying children, is the amount on line 9 less than \$11,650 (\$17,600 if married filing jointly)? ● 1 or more qualifying children, is the amount on line 9 less than \$19,550 (\$25,500 if married filing jointly)? <p><input type="checkbox"/> Yes. Go to line 11 now.</p> <p><input type="checkbox"/> No. Enter the credit, from the EIC Table, for the amount on line 9. Be sure to use the correct column for filing status and number of children</p> <p>11 Earned income credit.</p> <ul style="list-style-type: none"> ● If 'Yes' on line 10, enter the amount from line 8 ● If 'No' on line 10, enter the smaller of line 8 or line 10 	<p>1</p> <p>2 a</p> <p>b</p> <p>c</p> <p>3</p> <p>4 a</p> <p>b</p> <p>4 c</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p>	<p style="text-align: right;">140,467.</p> <hr/> <p style="text-align: right;">140,467.</p> <hr/> <p style="text-align: right;">140,467.</p> <hr/> <p style="text-align: right;">140,467.</p> <hr/>
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Enter line 11 amount on Form 1040, line 27.

If one or more of the boxes below are checked, the earned income credit is not allowed.

- 1 The total taxable earned income (line 7 above) is equal to or more than:
- \$21,430 (\$27,380 if married filing jointly) without a qualifying child.
- \$42,158 (\$48,108 if married filing jointly) with one qualifying child.
- \$47,915 (\$53,865 if married filing jointly) with two qualifying children.
- \$51,464 (\$57,414 if married filing jointly) with more than two qualifying children.
- 2 The Adjusted Gross Income (line 9 above) is equal to or more than:
- \$21,430 (\$27,380 if married filing jointly) without a qualifying child.
- \$42,158 (\$48,108 if married filing jointly) with one qualifying child.
- \$47,915 (\$53,865 if married filing jointly) with two qualifying children.
- \$51,464 (\$57,414 if married filing jointly) with more than two qualifying children.
- 3 Investment income is more than \$10,000.
(Investment Income Smart Worksheet, item H above)
- 4 **Without a qualifying child** - The married filing separate filing status is checked.
With a qualifying child - The married filing separate filing status is checked and taxpayer/spouse had the same principal residence for the last 6 months of 2021, and they did not live apart on 12/31 or had no written separation agreement or decree of separate maintenance.
(Information Worksheet, Part II)
- 5 Taxpayer (or spouse if filing joint) is a qualifying child of another person.
(Information Worksheet, Part IV)
- 6 Without a qualifying child, and your (or your spouse's, if married filing jointly) main home is in the U.S. less than half the year.
(Information Worksheet, Part IV)
- 7 Without a qualifying child, taxpayer (and spouse if filing joint) are under the minimum age to qualify for EIC.
(Information Worksheet, Part I)
- 8 Without a qualifying child, and taxpayer (or spouse if filing joint) is eligible to be claimed as a dependent on someone else's return.
(Information Worksheet, Part I)
- 9 Social Security Number is invalid for EIC purposes, for taxpayer, (or spouse, if married filing joint).
(Information Worksheet, Part I)
- 10 Have qualifying children, but all are qualifying children of another person.
(Information Worksheet, Part III)
- 11 Disallowed by IRS to claim Earned Income Credit in 2021.
(Information Worksheet, Part IV)
- 12 Filing Form 2555, Foreign Earned Income.
- 13 Not a citizen or resident alien for the entire year, claiming dual status.
(Information Worksheet, Part VI)
- 14 Head of household filing status and lived with nonresident alien spouse during the last six months of the year.
(Information Worksheet, Part IV)

Compliance and Due Diligence Information

1 Is this how long your dependents lived with you in the U.S in 2021?

- Yes**, all of the above is correct.
 No, I'll go back and review my dependent information.

The IRS may ask you for documents to prove you lived with anyone you're claiming for the Earned Income Credit.

Is this where you lived with your dependents the longest in 2021?

- 2 **Yes**, my dependents lived with me at this address.
 No, I'd like to add an additional address where I lived with my dependents. Use the Interview to add an additional address where you lived with your dependents the longest in 2021.

Compliance and Due Diligence Indicator **Yes** **No**

Potential qualifying child count ▶ 0
Non dependent potential qualifying child count ▶ 0
Qualifying child count (max 3) ▶ 0

Schedule SE Adjustments Worksheet

2021

▶ Keep for your records

Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security Number <u>736-07-2154</u>
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	(a) Taxpayer	(b) Spouse
QuickZoom to the Long Schedule SE ▶	<input type="checkbox"/>	<input type="checkbox"/>
A Approved Form 4029. Exempt from SE tax on all income	<input type="checkbox"/>	<input type="checkbox"/>
B Chapter 11 bankruptcy net profit or loss for Schedule SE, line 3 . . .		
C QuickZoom to the Explanation statement for any adjustment to SE income/loss shown on a partnership K-1. (See Help).		
Part I Farm Profit or (Loss) Schedule SE, line 1		
1 Total Schedules F		
2 Farm partnerships, Schedules K-1		
3 Other SE farm profit or (loss) (See Help)		
4 Less SE exempt farm profit or (loss) (See Help)		
5 Total for Schedule SE, line 1		
6 Conservation Reserve Program payments not subject to self-employment tax reported on:		
a Schedule F, line 4b		
b Schedule K-1 (Form 1065), box 20, code AH		
c Total CRP payments not subject to SE tax		
Part II Nonfarm Profit or (Loss) Schedule SE, line 2		
1 a Total Schedules C		
b Less SE exempt Schedules C (approved Form 4361)		
2 Nonfarm partnerships, Schedules K-1		
3 Forms 6781		
4 Other SE income reported as income on Form 1040, line 7		
5 a Clergy Form W-2 wages		
b Clergy housing allowance		
c Less clergy business deductions		
d QuickZoom to the Explanation statement for entry on line 5c		
6 Other SE nonfarm profit or (loss) (See Help)		
7 Less other SE exempt nonfarm profit or (loss) (See Help)		
8 Total for Schedule SE, line 2		
9 Exempt Notary Public income for Schedule SE, line 3 (See Help) . . .		
Part III Farm Optional Method Schedule SE, page 2, Part II		
1 Use Farm Optional Method	<input type="checkbox"/>	<input type="checkbox"/>
2 Gross farm income from Schedules F		
3 Gross farming or fishing income from partnership Schedules K-1 . . .		
4 Other gross farming or fishing self-employment income		
5 Total gross income for Farm Optional Method		
Part IV Nonfarm Optional Method Schedule SE, page 2, Part II		
1 Use Nonfarm Optional Method (Must have had net SE earnings of \$400 or more in 2 of prior 3 years and used the Nonfarm Optional Method less than 5 times)	<input type="checkbox"/>	<input type="checkbox"/>
2 Gross nonfarm income from Schedules C		
3 Gross nonfarm income from partnership Schedules K-1		
4 Other gross nonfarm self-employment income		
5 Total gross income for Nonfarm Optional Method		

**Schedule D Tax Worksheet
as refigured for the
Alternative Minimum Tax**

2021

► Keep for your records

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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	(a) Before Allocation of Capital Gain Excess *	(b) Allocation of Capital Gain Excess *	(c) After Allocation of Capital Gain Excess
1 Not applicable			
2 Enter your total qualified dividends as refigured for the Alternative Minimum Tax (AMT):			
a Total qualified dividends. 166 .			
b Adjustment from Schedules K-1			
c Other adjustments to qualified dividends			
d Total. Combine lines 2a, 2b, and 2c.	166 .	0 .	166 .
3 Enter the amount from Form 4952 for AMT, line 4g.			
4 Enter the amount from Form 4952 for AMT, line 4e.			
5 Subtract line 4 from line 3. If zero or less, enter -0-	0 .		0 .
6 Subtract line 5 from line 2. If zero or less, enter -0-	166 .		166 .
7 Net long-term capital gain:			
a Enter the gain from line 15 of Schedule D as refigured for the AMT 7,423 .			
b Enter the gain from line 16 of Schedule D as refigured for the AMT 68,240 .			
c Enter the smaller of line 7a or line 7b	7,423 .		7,423 .
8 Enter the smaller of line 3 or line 4			
9 Subtract line 8 from line 7c. If zero or less, enter -0-	7,423 .	0 .	7,423 .
10 Add lines 6 and 9	7,589 .		7,589 .
A Enter the amount from Form 6251, line 6.	135,122 .		
B Capital gain excess. Subtract line A from line 10. *	0 .		
11 Total 28% rate and unrecaptured section 1250 gain:			
a Enter the gain from line 18 of Schedule D as refigured for the AMT 0 .			
b Enter the gain from line 19 of Schedule D as refigured for the AMT			
c Add lines 11a and 11b.			0 .
12 Enter the smaller of line 9 or line 11c			0 .
13 Subtract line 12 from line 10. Also enter this amount on Form 6251, line 13.			7,589 .

* Capital gain excess applies only if filing Form 2555, Foreign Earned Income.

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Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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Taxable Income – Line 1

1	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract line 14 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	1	196,172.
2	Additions to income	2	
3	Add lines 1 and 2	3	196,172.
4	Subtractions from income	4	
5	Subtract line 4 from line 3. Enter on Form 6251, line 1	5	196,172.

Taxes – Line 2a

1	Generation skipping transfer taxes included on Schedule A, line 6	1	
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Refund of Taxes – Line 2b

1	Taxable refund of state and local income tax	1	
2	Amount and description of any refund of state and local personal property taxes, foreign income or real property taxes.	2	
3	Total tax refund adjustment. Enter on Form 6251, line 2b.	3	

Alternative Tax Net Operating Loss Deduction (ATNOLD) – Line 2f

1	Alternative minimum taxable income (AMTI) without ATNOLD	1	208,722.
2	Enter adjustments	2	
3	Adjustment for domestic production activities deduction	3	
4	Adjusted AMTI without ATNOLD. Add lines 1-3	4	208,722.
5	ATNOLD limitation. Multiply line 4 by 90%.	5	187,850.
6	Enter ATNOL carried to 2020 from other year(s)	6	
7	Enter ATNOL included above attributable to qualified disaster losses	7	
8	ATNOL above not attributable to qualified disaster losses. Line 6 minus 7	8	
9	ATNOL deduction other than qualified disaster losses. Lesser of line 5 or 8	9	
10	ATNOL Disaster Deduction. Lesser of line 7 or (line 4 minus line 9)	10	
11	ATNOLD. Add lines 9 and 10. Enter on Form 6251, line 2f, as neg	11	

Incentive Stock Options – Line 2i

1	Incentive stock options adjustment from Schedule K-1 worksheets	1	
2	Incentive stock options from Employer Stock Transaction Worksheets	2	
3	Incentive stock options from Exercise of Stock Options Worksheets	3	
4	Other incentive stock options	4	
5	Total incentive stock options. Enter on Form 6251, line 2i.	5	

Disposition of Property – Line 2k

	Alternative Minimum Tax	Regular Tax	Difference
1 Net capital gain or loss (Schedule D)	68,240.	68,240.	0.
2 Ordinary gain or loss (Form 4797, Part II)			
3 Ordinary income from sale of Incentive Stock			
4 Total. Enter on Form 6251, line 2k			0.

Post-86 Depreciation – Line 2l

1 From depreciation worksheets	1	
2 Plus amount from Schedule K-1 worksheets	2	
3 Add lines 1 and 2.	3	
4 Any amount relating to an activity for which the partnership interest basis limits apply, for which you are not at risk, or which is a tax shelter farm activity.	4	
5 Total. Subtract line 4 from line 3. Enter on Form 6251, line 2l.	5	

Passive Activities – Line 2m

1 Adjustment for recomputed income (loss) from passive activities	1	
2 Adjustment for recomputed income (loss) from publicly traded partnerships	2	
3 Other adjustments to passive activities	3	
4 Total. Add lines 1, 2, and 3. Enter on Form 6251, line 2m	4	

Circulation Costs – Line 2o

1 Circulation costs adjustment from Schedule K-1 Worksheets	1	
2 Other circulation costs adjustment	2	
3 Total. Add lines 1 and 2. Enter on Form 6251, line 2o	3	

Mining Costs – Line 2q

1 Mining costs adjustment from Schedule K-1 Worksheets	1	
2 Other mining costs adjustment	2	
3 Total. Add lines 1 and 2. Enter on Form 6251, line 2q	3	

Research and Experimental Costs – Line 2r

1 Research and Experimental costs adjustment from Schedule K-1 Worksheets	1	
2 Other research and experimental costs adjustment.	2	
3 Total. Add lines 1 and 2. Enter on Form 6251, line 2r	3	

Intangible Drilling Costs – Line 2t

1 Excess intangible drilling costs	1	
2 Net income from oil and gas wells	2	
3 Multiply line 2 by 65% (.65)	3	
4 Tentative intangible drilling costs preference. Subtract line 3 from line 1.	4	
5 Independent producers exception amount.	5	
6 Subtract line 5 from line 4. Enter this amount on Form 6251, line 2t	6	

Other Adjustments – Line 3

1 Pre-1987 depreciation from depreciation worksheets.	1	
2 Plus amount from Schedule K-1 worksheets	2	
3 Add lines 1 and 2	3	
4 Any amount relating to an activity for which the partnership interest basis limits apply, for which you are not at risk, or which is a tax shelter farm activity.	4	
5 Subtract line 4 from line 3	5	
6 Enter other adjustments, including income-based related adjustments	6	
7 Add lines 5 and 6	7	
8 Standard deduction if a qualified disaster loss was added to standard deduction.	8	
9 Total other adjustments. Add lines 7 and 8 and enter on Form 6251, line 3	9	

Alternative Minimum Taxable Income – Line 4

If married filing separately and Form 6251, line 4, is more than \$752,800:		
1	Alternative minimum taxable income, Form 6251	1
2	Threshold amount	2
3	Subtract line 2 from line 1	3
4	Multiply line 3 by 25% (.25)	4
5	Smaller of line 4 or \$57,300	5
6	Add line 1 and line 5. Enter on Form 6251, line 4	6

Exemption – Line 5

1	Enter \$73,600 if single or head of household, \$114,600 if married filing jointly or qualifying widow(er), \$57,300 if married filing separately	1	73,600.
2	Enter your alternative minimum taxable income from Form 6251, line 4	2	208,722.
3	Enter \$523,600 if single or head of household, \$1,047,200 if married filing jointly or qualifying widow(er), \$523,600 if married filing separately	3	523,600.
4	Subtract line 3 from line 2. If zero or less, enter -0-	4	0.
5	Multiply line 4 by 25% (.25)	5	0.
6	Subtract line 5 from line 1. If zero or less, enter -0-. Enter on 6251, line 5	6	73,600.

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Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security Number <u>736-07-2154</u>		
1 Enter the amount from Form 6251, line 6	1		
2 a Enter the amount from your (and your spouse's if filing jointly) Form 2555, lines 45 and 50.	2a		
b Enter the total amount of any itemized deductions or exclusions you couldn't claim because they are related to excluded income	2b		
c Subtract line 2b from line 2a. If zero or less, enter 0	2c		
3 Add line 1 and line 2c	3		
4 Tax on the amount on line 3. <ul style="list-style-type: none"> ● If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; or you reported qualified dividends on Form 1040 or 1040-SR, line 3a; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040 or 1040-SR) (as refigured for the AMT, if necessary), enter the amount from line 3 of this worksheet on Form 6251, line 12. Complete the rest of Part III of Form 6251. However, before completing Part III, see <i>Form 2555</i>, later, to see if you must complete Part III with certain modifications. Then enter the amount from Form 6251, line 40, here. ● All Others: If line 3 is \$199,900 or less (\$99,950 or less if married filing separately), multiply line 3 by 26% (0.26). Otherwise, multiply line 3 by 28% (0.28) and subtract \$3,998 (\$1,999 if married filing separately) from the result. 	4		
5 Tax on amount on line 2c. If line 2c is \$199,900 or less (\$99,950 or less if married filing separately), multiply line 2c by 26% (0.26). Otherwise, multiply line 2c by 28% (0.28) and subtract \$3,998 (\$1,999 if married filing separately) from the result	5		
6 Subtract line 5 from line 4. Enter the result here and on Form 6251, line 7.	6		

Federal Carryover Worksheet

2021

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Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
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2020 State and Local Income Tax Information

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With- held/Pmts	(e) Paid With Return	(f) Total Over- payment	(g) Applied Amount
AZ			1,619.	2,007.		
OR			4,646.	3,807.		
Totals . .			6,265.	5,814.		

2020 State Extension Information

(a) State	(b) Paid With Extension

2020 Locality Extension Information

(a) Locality	(b) Paid With Extension

2020 State Estimates Information

(a) State	(c) Estimates Paid After 12/31

2020 Locality Estimates Information

(a) Locality	(c) Estimates Paid After 12/31

2020 State Taxes Due Information

(a) State	(e) Paid With Return
AZ	2,007.
OR	3,807.

2020 Locality Taxes Due Information

(a) Locality	(e) Paid With Return

2020 State Refund Applied Information

(a) State	(g) Applied Amount

2020 Locality Refund Applied Information

(a) Locality	(g) Applied Amount

2020 State Tax Refund Information

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment
AZ	1,619.	
OR	4,646.	

2020 Locality Tax Refund Information

(a) Locality	(d) Total Withheld/Pmts	(f) Total Overpayment

Arpan Kundu

736-07-2154

Other Tax and Income Information		2020	2021
1	Filing status	1 <u>1</u> Single	1 <u>1</u> Single
2	Number of exemptions for blind or over 65 (0 - 4)	2 _____	2 _____
3	Itemized deductions	3 <u>7,192.</u>	<u>9,445.</u>
4	Check box if required to itemize deductions	4 <input type="checkbox"/>	<input type="checkbox"/>
5	Adjusted gross income	5 <u>222,333.</u>	<u>209,022.</u>
6	Tax liability for Form 2210 or Form 2210-F	6 <u>48,172.</u>	<u>42,655.</u>
7	Alternative minimum tax	7 _____	_____
8 a	Federal overpayment applied to next year estimated tax	8 a _____	_____
b	Federal extension payment for 2020 return	b _____	_____

QuickZoom to the IRA Information Worksheet for IRA information ►

Excess Contributions		2020	2021
9 a	Taxpayer's excess Archer MSA contributions as of 12/31	9 a _____	_____
b	Spouse's excess Archer MSA contributions as of 12/31	b _____	_____
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31	10 a _____	_____
b	Spouse's excess Coverdell ESA contributions as of 12/31	b _____	_____
11 a	Taxpayer's excess HSA contributions as of 12/31	11 a _____	_____
b	Spouse's excess HSA contributions as of 12/31	b _____	_____

Loss and Expense Carryovers		2020	2021
Note: Enter all entries as a positive amount			
12 a	Short-term capital loss	12 a _____	_____
b	AMT Short-term capital loss	b _____	_____
13 a	Long-term capital loss	13 a _____	_____
b	AMT Long-term capital loss	b _____	_____
14 a	Net operating loss available to carry forward	14 a _____	_____
b	AMT Net operating loss available to carry forward	b _____	_____
15 a	Investment interest expense disallowed	15 a _____	_____
b	AMT Investment interest expense disallowed	b _____	_____
16	Nonrecaptured net Section 1231 losses from:	16 a _____	_____
	a 2021	b _____	_____
	b 2020	c _____	_____
	c 2019	d _____	_____
	d 2018	e _____	_____
	e 2017	f _____	_____
	f 2016	_____	_____
17	AMT Nonrecap'd net Sec 1231 losses from:	17 a _____	_____
	a 2021	b _____	_____
	b 2020	c _____	_____
	c 2019	d _____	_____
	d 2018	e _____	_____
	e 2017	f _____	_____
	f 2016	_____	_____

Credit Carryovers			2020	2021
18	General business credit		18	
19	Adoption credit from:		19 a	
	a	2021		
	b	2020		
	c	2019		
	d	2018		
	e	2017		
	f	2016		
20	Mortgage interest credit from:		20 a	
	a	2021		
	b	2020		
	c	2019		
	d	2018		
21	Credit for prior year minimum tax		21	
22	District of Columbia first-time homebuyer credit		22	
23	Residential energy efficient property credit		23	

Other Carryovers			2020	2021
24	Section 179 expense deduction disallowed		24	
25	Excess foreign housing deduction:		25 a	
	a	Taxpayer (Form 2555, line 46)		
	b	Taxpayer (Form 2555, line 48)		
	c	Spouse (Form 2555, line 46)		
	d	Spouse (Form 2555, line 48)		

Charitable Contribution Carryovers

26	2020 Carryover of charitable contributions from:	Other Property		Capital Gain		Cash
		(a) 50%	(b) 30%	(c) 30%	(d) 20%	(e) 60/100%
	a	2020				
	b	2019				
	c	2018				
	d	2017				
	e	2016				
27	2021 Carryover of charitable contributions from:	Other Property		Capital Gain		Cash
		(a) 50%	(b) 30%	(c) 30%	(d) 20%	(e) 60/100%
	a	2021				
	b	2020				
	c	2019				
	d	2018				
	e	2017				

28 Amount overpaid less earned income credit 0.

Qualified Business Income Deduction (Section 199A) carryovers			2020	2021
29	Qualified business loss carryforward		29	
30	Qualified PTP loss carryforward		30	
31	Applicable percentage			
		2018	31 a	
		2019	b	100.00
		2020	b	

2020 State Capital Loss Carryovers (For users not transferring from the prior year)

State ID	Short-term Capital Loss for State	AMT Short-term Capital Loss for State	Long-term Capital Loss for State	AMT Long-term Capital Loss for State	Capital Loss (combined) for State	AMT Capital Loss (combined) for State



► Keep for your records

Name(s) Shown on Return Arpan Kundu	Social Security Number 736-07-2154
--	---------------------------------------

Description	Amount
Income	
Wages	140,467.
Interest income before Series EE bond exclusion	
Dividend income	196.
Tax refund	
Alimony received	
Nonpassive business income or loss	
Royalty and nonpassive rental activities income or loss	
Nonpassive partnership income or loss	
Nonpassive S corporation income or loss	
Nonpassive farm rental income or loss	
Nonpassive farm income or loss	
Nonpassive estate and trust income or loss	
Real estate mortgage investment conduits	
Business gains and losses from nonpassive activities	
Capital gains and losses	68,240.
Taxable IRA distributions	
Taxable pension distributions	
Unemployment compensation	
Other income	119.
Total income	209,022.
Adjustments	
Educator expenses	
Certain business expenses of reservists, performing artists, and government officials	
Health savings account deduction	
Moving expenses	
Self-employed SEP, SIMPLE, and qualified plans	
Self-employed health insurance deduction	
Penalty on early withdrawals of savings	
Alimony paid	
Other adjustments	
Total adjustments	
Modified adjusted gross income	209,022.

Two-Year Comparison

2021

Name(s) Shown on Return Arpan Kundu		Social Security Number		
Income	2020	2021	Difference	%
Wages, salaries, tips, etc	138,368.	140,467.	2,099.	1.52
Interest and dividend income	6,718.	196.	-6,522.	-97.08
State tax refund	0.		0.	
Business income (loss)				
Capital and other gains (losses)	77,247.	68,240.	-9,007.	-11.66
IRA distributions				
Pensions and annuities				
Rents and royalties				
Partnerships, S Corps, etc				
Farm income (loss)				
Social security benefits				
Income other than the above		119.	119.	
Total Income	222,333.	209,022.	-13,311.	-5.99
Adjustments to Income				
Adjusted Gross Income	222,333.	209,022.	-13,311.	-5.99
Itemized Deductions				
Medical and dental				
Income or sales tax	6,362.	9,445.	3,083.	48.46
Real estate taxes				
Personal property and other taxes	830.		-830.	-100.00
Interest paid				
Gifts to charity				
Casualty and theft losses				
Miscellaneous				
Total Itemized Deductions	7,192.	9,445.	2,253.	31.33
Standard or Itemized Deduction	12,400.	12,850.	450.	3.63
Qualified Business Income Deduction	1.		-1.	-100.00
Taxable Income	209,932.	196,172.	-13,760.	-6.55
Income tax	47,323.	42,312.	-5,011.	-10.59
Additional income taxes				
Alternative minimum tax				
Total Income Taxes	47,323.	42,312.	-5,011.	-10.59
Nonbusiness credits				
Business credits				
Total Credits				
Self-employment tax				
Other taxes	849.	343.	-506.	-59.60
Total Tax After Credits	48,172.	42,655.	-5,517.	-11.45
Withholding	25,024.	22,865.	-2,159.	-8.63
Estimated and extension payments				
Earned income credit				
Additional child tax credit				
Other payments	783.		-783.	-100.00
Total Payments	25,807.	22,865.	-2,942.	-11.40
Form 2210 penalty		309.	309.	
Applied to next year's estimated tax				
Refund				
Balance Due	22,365.	20,099.	-2,266.	-10.13

Current year effective tax rate 20.24 %

Tax Summary
▶ Keep for your records

2021

Name (s)
Arpan Kundu

Total income	209,022.
Adjustments to income	
Adjusted gross income	209,022.
Itemized/standard deduction	12,850.
Qualified business income deduction	
Taxable income	196,172.
Tentative tax	42,312.
Additional taxes	
Alternative minimum tax	
Total credits	
Other taxes	343.
Total tax	42,655.
Total payments	22,865.
Estimated tax penalty	309.
Amount Overpaid	0.
Refund	0.
Amount Applied to Estimate	0.
Balance due	20,099.

Recovery Rebate Credit Worksheet

2021

Name(s) Shown on Return
Arpan Kundu

Social Security No.
736-07-2154

This worksheet is used to compute the allowed recovery rebate credit for line 30 of Form 1040 or 1040-SR after accounting for any economic stimulus payment previously received.

<p>1 Can you be claimed as a dependent on another person's 2021 return? <input checked="" type="checkbox"/> No. Go to line 2 <input type="checkbox"/> Yes. Stop. You can't take the credit. Don't complete the rest of this worksheet</p> <p>2 Does your 2021 return include a social security number that was issued on or before the due date of your 2021 return (including extensions) for you and, if filing a joint return, your spouse? <input checked="" type="checkbox"/> Yes. Go to line 6 <input type="checkbox"/> No. If you are filing a joint return, go to line 3. If you aren't filing a joint return, go to line 5.</p> <p>3 Was at least one of you a member of the U.S. Armed Forces at any time during 2020, and does at least one of you have a social security number that was issued on or before the due date of your 2021 return (including extensions)? <input type="checkbox"/> Yes. Your credit is not limited. Go to line 6. <input type="checkbox"/> No. Go to line 4.</p> <p>4 Does one of you have a social security number that was issued on or before the due date of your 2021 return (including extensions)? <input type="checkbox"/> Yes. Your credit is limited. Go to line 6. <input type="checkbox"/> No. Go to line 5</p> <p>5 Do you have any dependents listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you entered a social security number that was issued on or before the due date of your 2021 return (including extensions) or an adoption taxpayer identification number? <input type="checkbox"/> Yes. Enter 0 on line 6 and go to line 7. <input type="checkbox"/> No. Stop. You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on Form 1040, line 30.</p> <p>6 Enter: ● \$1,400 if single, head of household, married filing separately, qualifying widow(er). ● \$1,400 if married filing jointly and you answered "Yes" to question 4, or ● \$2,800 if married filing jointly and you answered "Yes" to question 2 or 3</p> <p>7 Multiply \$1,400 by the number of dependents listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you entered a social security number that was issued on or before the due date of your 2021 return (including identification number</p> <p>8 Add lines 6 and 7</p> <p>9 Is the amount on line 11 of Form 1040 or 1040-SR more than the amount shown below for your filing status? ● Single or married filing separately-\$75,000 ● Married filing jointly or qualifying widow(er)-\$150,000 ● Head of household-\$112,500 <input checked="" type="checkbox"/> Yes. Enter the amount from line 11 of Form 1040 or 1040-SR and go to line 10 <input type="checkbox"/> No. Enter the amount from line 8 on line 12 and skip lines 10 and 11</p> <p>10 Is line 9 more than the amount shown below for your filing status? ● Single or married filing separately-\$80,000 ● Married filing jointly or qualifying widow(er)-\$160,000 ● Head of household-\$120,000 <input checked="" type="checkbox"/> Yes. Stop. You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on Form 1040, line 30. <input type="checkbox"/> No. Subtract line 9 from the amount shown above for your filing status.</p> <p>11 Divide line 10 by the amount shown below for your filing status. Enter the result as a decimal (rounded to at least 2 places). ● Single or married filing separately-\$5,000 ● Married filing jointly or qualifying widow(er)-\$10,000 ● Head of household-\$7,500</p> <p>12 Multiply line 8 by line 11.</p> <p>13 Enter the amount, if any, of EIP 3 that was issued to you. If filing a joint return, include the amount, if any, of your spouse's EIP 3. You may refer to Notice 1444-C or your tax account information at IRS.gov/Account for the amount to enter here</p> <p>14 Recovery rebate credit. Subtract line 13 from line 12. If zero or less, enter -0-. If line 13 is more than line 12, you don't have to pay back the difference. Enter the result here and, if more than zero, on line 30 of Form 1040 or 1040-SR</p>	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;">6</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black; text-align: center;">1,400.</td> </tr> <tr> <td>7</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td>8</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black; text-align: center;">1,400.</td> </tr> <tr> <td>9</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black; text-align: center;">209,022.</td> </tr> <tr> <td>10</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>11</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>12</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>13</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td>14</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> </table>	6	1,400.	7		8	1,400.	9	209,022.	10		11		12		13		14	
6	1,400.																		
7																			
8	1,400.																		
9	209,022.																		
10																			
11																			
12																			
13																			
14																			

Compare to U. S. Averages

▶ Keep for your records

2021

Name(s) Shown on Return <u>Arpan Kundu</u>	Social Security No <u>736-07-2154</u>
---	--

Your 2021 adjusted gross income (AGI) 209,022.
 National adjusted gross income range used below from 200,000. to 249,999.

Note: National average amounts have been adjusted for inflation. See Help for details.

Selected Income, Deductions, and Credits	Actual Per Return	National Average
Salaries and wages	140,467.	189,948.
Taxable interest		2,219.
Tax-exempt interest		8,574.
Dividends	196.	10,101.
Business net income less loss		50,572.
Net capital gain	68,240.	26,256.
Net capital loss		2,386.
Taxable IRAs pensions and annuities		42,683.
Rent and royalty net income less loss		20,321.
Partnership and S corporation net income less loss		74,239.
Taxable social security benefits		27,855.
Medical and dental expenses deduction		18,415.
Taxes paid deduction	9,445.	19,349.
Interest paid deduction		11,704.
Charitable contributions deduction		5,968.
Total itemized deductions	9,445.	37,947.
Child care credit		610.
Education tax credits		0.
Child tax credit		675.
Retirement savings contributions credit		0.
Earned income credit		0.
Other Information	Actual Per Return	National Average
Adjusted gross income	209,022.	235,084.
Taxable income	196,172.	187,496.
Income tax	42,312.	38,624.
Alternative minimum tax		2,838.
Total tax liability	42,655.	40,072.

Estimated Taxes and Form W-4 Worksheet

Name: Arpan Kundu
SSN: 736-07-2154

Note: To calculate additional withholding for more than 3 jobs between taxpayer and spouse, or if the lowest paying job earns more than \$120,000 - see the IRS W-4 Calculator at www.irs.gov/W4App.

Choose the Method You Will Use to Pay Your 2022 Federal Income Taxes

By withholding from my paychecks. (You will also need to complete the **Additional Information for Form W-4 Worksheet**. QuickZoom below.)

By making estimated tax payments. If estimated payments are in addition to withholding, my estimated 2022 withholding will be _____.

Overpayment from my 2021 return. 0.

Amount of my 2021 overpayment to apply to 2022 instead of refunding it _____

Enter Your Filing Status and Other Information for Your 2022 Tax Return

Choose your filing status 1 - Single

Taxpayer age as of the end of 2022 32
 Spouse age as of the end of 2022 _____

Do you qualify for an additional standard deduction?
Taxpayer: _____ **Total** 0
Spouse: _____

Check if you must itemize in 2022. (See Tax Help.)

Dependent of Another

Check if you will be the dependent of another person (but not if married filing jointly).

Dependents on return:	2021	2022
Number of qualifying children dependents age 16 and under	<u>0</u>	<u>0</u>
Number of qualifying children dependents age 17 to 23	<u>0</u>	<u>0</u>
Number of other dependents on return	<u>0</u>	<u>0</u>

Enter Your 2022 Income and Deductions in 2nd column	2021 Actual	2022 Expected
Compensation:		
Annual wages and salary for taxpayer	<u>140,467.</u>	_____
Medicare wages for taxpayer (W-2 box 5)	<u>145,999.</u>	_____
Annual wages and salary for spouse	_____	_____
Medicare wages for spouse (W-2 box 5)	_____	_____
Self-employment Income:		
Schedule C income for taxpayer	_____	_____
Schedule C income for spouse	_____	_____
Schedule F & K-1 income for taxpayer	_____	_____
Schedule F & K-1 income for spouse	_____	_____
Conservation Reserve Program Payments for taxpayer	_____	_____
Conservation Reserve Program Payments for spouse	_____	_____
Annual net income from self-employment for taxpayer	_____	_____
Annual net income from self-employment for spouse	_____	_____

W-2: Check to populate W-2 table from 2021 return

Employer	Owner	Wages	2021 Withholding	2022 Wages	2022 Withholding

Schedule C: Check to populate Schedule C table from 2021 return

Name	Owner	2021 Income	2021 Expenses	2022 Income	2022 Expenses

Other Tax Information:		
Note: Include this income in the Other Income section below.		
Net Investment Income for 3.8% tax	68,555.	
Qualified dividends	166.	
Maximum Capital Gains Rate Tax Information:		
Net short-term capital gains or losses	60,817.	
Net long-term capital gains or losses	7,423.	
Net 28%-rate capital gains included in long-term		
Unrecap'd Sec 1250 gains incl in long-term (<i>see Tax Help</i>)		
Investment income election (<i>see Tax Help</i>)		
Other Income:		
Total of your other taxable income and losses (<i>see Tax Help</i>)	315.	
Foreign income or housing exclusions		
Adjustments:		
Deductible IRA contributions, alimony, etc		
Itemized Deductions:		
Total medical expenses		
State and local property and income taxes (or sales tax)	9,445.	
Deductible foreign income taxes		
Deductible mortgage interest		
Cash charitable contributions		
Other charitable contributions		
Deductible investment interest expense, casualty or theft losses (<i>see Tax Help</i>)		
Other itemized deductions		
Net qualified disaster loss (<i>see Tax Help</i>)		
Standard Deduction:		
Standard deduction	12,550.	12,950.
Charitable cash contributions if using the standard deduction	300.	

Deduction Allowed:		
Deduction (<i>greater of standard+qual'd disaster loss or item'd</i>)	12,550.	12,950.
Other Deduction:		
Qualified business income deduction (<i>see Tax Help</i>)		
Credits:		
Earned Income Tax Credit		
Child Tax Credit		
Child and Dependent Care Credit		
Education Credits		
Other Credits.		

Income Tax Calculation for Your 2022 Tax Return	2021 Actual	2022 Expected
Taxable income	196,172.	0.
Income tax	42,312.	
Alternative minimum tax (Enter Alt Min tax expected in 2022) . . .		
Premium tax credit repayment (Enter amt expected for 2022) . . .		
Total credits (Enter credits expected in 2022)		
Tax on self-employment income and add'l 0.9% Medicare tax . . .		0.
Net investment income tax (3.8%)	343.	0.
Other taxes (Enter other taxes expected in 2022)	0.	
Total federal income tax	42,655.	0.

Enter the Tax Payments You've Already Made for Your 2022 Tax Return	
The federal income tax actually withheld from your paychecks to date	
Taxpayer	
Spouse	
Federal estimated tax payments you've already made	
Payment number 1 (April 18, 2022)	
Payment number 2 (June 15, 2022)	
Payment number 3 (September 15, 2022)	
2021 federal overpayment credited to 2022 (<i>from page 1 above</i>)	
Total taxes paid to date	
Balance of payments needed or (expected refund)	0.

Summary of Taxes to be Paid for 2022	
Federal income taxes to be withheld from your paychecks	
Your 2021 federal overpayment you applied to 2022	
Your 2022 federal estimated taxes,	
based on <u>110% of your 2021 actual tax</u>	24,056.
Estimate of total payments you will need to make for 2022	24,056.

Estimated Tax Payment Options

Name:	<u>Arpan Kundu</u>
SSN:	<u>736-07-2154</u>

Prepare My 2022 Estimated Taxes Based on	Tax Amount
<input type="checkbox"/> 90% of tax on your 2022 estimated taxable income	0.
<input type="checkbox"/> 100% of tax on your 2022 estimated taxable income	0.
<input type="checkbox"/> 66-2/3% of tax on your 2022 estimated taxable income (for farmers and fishermen only, see Tax Help)	0.
<input checked="" type="checkbox"/> 100% (110%) of your 2021 taxes (prior-year exception) Note: If your 2021 taxes were less than \$1000, see Tax Help	46,921.

Amount of Estimated Taxes to Pay in 2022	
Taxes based on method above	46,921.
Expected withholding for 2022 . . . (.2021 actual withholding)	22,865.
Taxes due after withholding	24,056.
Estimates you've already paid	_____
Last year's overpayment you applied to this year	_____
Balance of estimated taxes due	24,056.

Round My Payments Up
<input type="checkbox"/> To the next \$10
<input type="checkbox"/> To the next \$100

Prepare Estimated Tax Payment Vouchers
<input checked="" type="checkbox"/> The amount of estimated taxes due is \$1,000 or more (see Tax Help)
<input type="checkbox"/> Even if the amount of estimated taxes due is less than \$1,000
<input type="checkbox"/> No, do not prepare estimated tax payment vouchers

Schedule of Estimated Tax Payments for 2022	
Check the box for the payment date due next. We will prepare your vouchers based on your choice.	
<input type="checkbox"/> Payment number 1, due April 18, 2022	6,014.
<input type="checkbox"/> Payment number 2, due June 15, 2022	6,014.
<input type="checkbox"/> Payment number 3, due September 15, 2022	6,014.
<input type="checkbox"/> Payment number 4, due January 17, 2023	6,014.

Total estimated tax payments for 2022	24,056.
---	---------

Print Estimated Tax Vouchers
<input checked="" type="checkbox"/> Yes, print those prepared by program
<input type="checkbox"/> No, I will use those supplied by the I.R.S. and write in the amounts

Additional Information for Form W-4

Name:	<u>Arpan Kundu</u>
SSN:	<u>736-07-2154</u>

Note: To calculate additional withholding for more than 3 jobs between taxpayer and spouse, or if the lowest paying job earns more than \$120,000 - see the IRS W-4 Calculator at www.irs.gov/W4App.

<input type="checkbox"/> This box will be checked if your entries on the Estimated Taxes and Form W-4 Worksheet indicate that this worksheet and Form W-4 are necessary for your next year's plan.		
Enter Salary and Pay Periods for 2022	Taxpayer	Spouse
Your annual salary for this year	_____	_____
Salary you have already received in 2022	_____	_____
Your remaining salary for this year	_____ 0.	_____
Number of paychecks you have remaining this year		
How often you are paid	_____	_____
Your gross salary per pay period	_____	_____

Form W-4 Personal Withholding Adjustments	Taxpayer	Spouse
Withholding status	_____	_____
Additional withholding per pay period	_____	_____
Estimated future withholding per pay period	_____	_____
Estimated future withholding through remainder of year	_____	_____
Top tax rate being withheld	_____ %	_____ %

Change in Federal Income Tax Withholding per Pay Period	Taxpayer	Spouse
See tax help for more information.		
Current withholding per pay period	_____	_____
Estimated future withholding per pay period	_____	_____
Increase/(decrease) in net pay per pay period	_____	_____

Summary of Federal Income Taxes to be Withheld in 2022: Total taxes withheld to date, entered on ES & Form W4 Worksheet and future withholding from above.	
Taxpayer's withholding	_____
Spouse's withholding	_____
Total withholding	_____

ELECTRONIC POSTMARK - CERTIFICATION OF ELECTRONIC FILING

Taxpayer: Arpan Kundu
Primary SSN: 736-07-2154

Federal Return Submitted: _____
Federal Return Acceptance Date: _____

Your return has not been electronically transmitted yet

The Intuit Electronic Postmark shows the date and time Intuit received your federal tax return. The Intuit Electronic Postmark documents the filing date of your income tax return, and the electronic postmark information should be kept on file with your tax return and other tax-related documentation.

There are two important aspects of the Intuit Electronic Postmark:

1. THE INTUIT ELECTRONIC POSTMARK.

The electronic postmark shows the date and time Intuit received the federal return, and is deemed the filing date if the date of the electronic postmark is on or before the date prescribed for filing of the federal individual income tax return.

TIMELY FILING:

For your federal return to be considered filed on time, your return must be postmarked on or before midnight . Intuit's electronic postmark is issued in the Pacific Time (PT) zone. If you are not filing in the PT zone, you will need to add or subtract hours from the Intuit Electronic Postmark time to determine your local postmark time. For example, if you are filing in the Eastern Time (ET) zone, and you electronically file your return at 9 AM on , your Intuit electronic postmark will indicate , 6 AM. If your federal tax return is rejected, the IRS still considers it filed on time if the electronic postmark is on or before , and a corrected return is submitted and accepted before . If your return is submitted after , a new time stamp is issued to reflect that your return was submitted after the IRS deadline, and consequently, is no longer considered to have been filed on time.

If you request an automatic six-month extension, your return must be electronically postmarked by midnight . If your federal tax return is rejected, the IRS will still consider it filed on time if the electronic postmark is on or before , and the corrected return is submitted and accepted by

2. THE ACCEPTANCE DATE.

Once the IRS accepts the electronically filed return, the acceptance date will be provided by the Intuit Electronic Filing Center. This date is proof that the IRS accepted the electronically filed return.

We need your consent - Early Access

This is an IRS requirement

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) at <https://www.treasury.gov/tigta/>.

To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

<hr/> <hr/> <hr/> <hr/>

First Name

Last Name

Please type the date below:

Date

F7216U01 SBIA5001

Read and accept this Disclosure Consent

This is an IRS requirement

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

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To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

Sign this agreement by entering your name:

Please type the date below:

Date

Read and accept this Disclosure Consent

This is an IRS requirement

To, enable the Tax Identity restoration protection service that you purchased as part of a bundle, we need your consent to send some of your personal information to our partner, ID Notify.

Entering your name and date below allows us to disclose the data below to IDNotify, provided by CSIdentity Corp., an Experian company. With your consent, we will send the following: First Name, Middle Initial, Last Name, Date of Birth, Phone Number, Street Address, City, State, Zip, Social Security Number, Email Address, Username, and a randomly generated Subscriber Number.

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) at <https://www.treasury.gov/tigta/>.

To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

I authorize Intuit to send my information listed above to CSIdentity Corporation.

Sign this agreement by entering your name:

Please type the date below:

Date

IMPORTANT DISCLOSURES

If you are owed federal tax refund(s), you have a right to choose how you will receive the refund(s). There are several options available to you. Please read about these options below.

You can file your federal tax return(s) electronically or by paper and obtain your federal tax refund(s) directly from the Internal Revenue Service ("IRS") for free. If you file your tax return(s) electronically, you can receive refund checks directly from the IRS through the U.S. Postal Service in 21 to 28 days from the time you file your tax return(s) or the IRS can deposit your refund(s) directly into your bank account in less than 21 days from the time you file your tax return(s) unless there are delays by the IRS. If you file a paper return through the U.S. Postal Service, you can receive refund checks directly from the IRS through the U.S. Postal Service in 6 to 8 weeks from the time the IRS receives your return(s) or the IRS can deposit your refund(s) directly into your bank account in 6 to 8 weeks from the time the IRS receives your return(s). However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2022.

You can file your federal tax return(s) electronically, select the Refund Processing Service ("RPS"), and have your federal tax refund(s) processed through a processor using banking services of a financial institution. The RPS allows your refund(s) to be deposited into a bank account at Green Dot Bank ("Bank") and deducts your TurboTax fees and other amounts that you authorize from your federal refund(s). The balance of your federal refund(s) is delivered to you via the disbursement method you select. If you file your tax return(s) electronically and select the RPS, the IRS will deposit your refund(s) with Bank. Upon Bank's receipt of your refund(s), Santa Barbara Tax Products Group, LLC, a division of Green Dot Corporation, a Delaware corporation, a processor, will deduct from your federal refund(s) any fees charged by TurboTax for the preparation and filing of your tax return(s) and any other amounts authorized by you and disburse the balance of your refund proceeds to you. Unless there are unexpected delays, federal refunds are received in less than 21 days from the time you file your tax return(s) electronically. However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2022.

The RPS is not necessary to obtain your refund(s). If you have an existing bank account, you do not need to use the RPS in order to receive a direct deposit from the IRS. You may consult the IRS website (IRS.gov) for information about tax refund processing.

If you select the RPS, no prior debt you may owe to Bank will be deducted from your refund(s).

You can change your income tax withholdings which might result in you receiving additional funds throughout the year rather than waiting to receive these funds potentially in tax refund(s) next year. Please consult your employer or tax advisor for additional details.

This Agreement requires all disputes to be resolved by way of binding arbitration. The terms of the arbitration provision appear in Section 10.

Information regarding low-cost deposit accounts may be available at www.mymoney.gov

The chart below shows the options for filing your federal tax returns (e-file or paper returns), the RPS product, refund disbursement options, estimated timing for obtaining your federal tax refund proceeds, and costs associated with the various options.

WHAT TYPE OF FILING METHOD?	WHAT ARE YOUR DISBURSEMENT OPTIONS?	WHAT IS THE ESTIMATED TIME TO RECEIVE REFUND(S)?	WHAT COSTS DO YOU INCUR IN ADDITION TO TAX PREPARATION FEES?
PAPER RETURN No Refund Processing Service	IRS direct deposit to your personal bank account.	Approximately 6 to 8 weeks ¹	Free
	Check mailed by IRS to address on tax return(s).	Approximately 6 to 8 weeks ¹	
ELECTRONIC FILING (E-FILE) No Refund Processing Service	IRS direct deposit to your personal bank account.	Usually within 21 days ¹	Free
	Check mailed by IRS to address on tax return(s).	Approximately 21 to 28 days ¹	
ELECTRONIC FILING (E-FILE) Refund Processing Service	Direct deposit to your personal bank account.	Usually within 21 days ¹	Free option with your purchase of a Tax Product ²

¹You may experience delays with your tax refund(s) if, for example, you enter incorrect bank account or contact information, you enter a bank account in someone else's name, or if possible suspicious activity is detected. If your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2022.

²The charges here consist of a TurboTax Fee, the cost of the Tax Product, and any fees for additional products and services purchased. Note that the cost of the Tax Product may vary depending on the edition of TurboTax purchased. See Section 3 of the Refund Processing Service Agreement for the cost of the service you have chosen.

Questions? Call 877-908-7228

Pro Delegation Worksheet

2021

Check this box if you are preparing this return as a PRO preparer

Preparer / Electronic Return Originator (ERO) Information

Preparer Name _____ Print name in signature area?
Preparer Tax ID # (PTIN) _____
NY Tax Preparer Registration # _____ or NY Exclusion Code _____
For NM, OR Preparers Only: State ID# _____
Preparer E-mail _____ Print date on return?
Preparer Phone _____ CAF # _____
Electronic Filing Only: ERO Practitioner PIN _____

Electronic Filing and Printing of Tax Return Information

Electronic Filing:

- File federal return electronically
 File state returns electronically
 File other returns electronically

Print and Mail Selections (use only if e-file ineligible):

- Federal return printed and mailed to IRS
 State return printed and mailed to state agency
 Other return printed and mailed

Select state returns to file electronically:

Table with header 'State(s)' and three blank rows for input.

Select state returns to file by mail:

Table with header 'State(s)' and three blank rows for input.

Select other returns to file electronically:

Table with header 'Other Return(s)' and three blank rows for input.

Select other returns to file by mail:

Table with header 'Other Return(s)' and three blank rows for input.

Electronic Filing and Printing of Amended Return Information

Electronic Filing:

- File federal amended return(s) electronically
 File state amended return(s) electronically

Print and Mail Selections (use only if e-file ineligible):

- Federal amended return printed and mailed
 State amended return printed and mailed

Select state amended return(s) to file electronically:

Table with header 'State(s)' and three blank rows for input.

Select state amended return(s) to file by mail:

Table with header 'State(s)' and three blank rows for input.

Smart Worksheets From 2021 Federal Tax Return

SMART WORKSHEET FOR: 1040/1040SR Wks: Form 1040 or Form 1040-SR Worksheet

Tax Smart Worksheet	
A Tax	42,312.
Check if from:	
1 Tax table	<input type="checkbox"/>
2 Tax Computation Worksheet (see instructions)	<input type="checkbox"/>
3 Schedule D Tax Worksheet	<input type="checkbox"/>
4 Qualified Dividends and Capital Gain Tax Worksheet	<input checked="" type="checkbox"/>
5 Schedule J	<input type="checkbox"/>
6 Form 8615	<input type="checkbox"/>
7 Foreign Earned Income Tax Worksheet	<input type="checkbox"/>
B Additional tax from Form 8814	_____
C Additional tax from Form 4972	_____
D Tax from additional Form(s) 4972	_____
E Recapture tax from Form 8863	_____
F IRC Section 197(f)(9)(B)(ii) election for an additional tax	_____
G Health Coverage Tax Credit Recovery, Form 8885, Line 5, if negative	_____
H Additional tax from Form 8621	_____
I Tax. Add lines A through G. Enter the result here and include in tax below.	42,312.
J Form 8621 tax deferral from line 9c (to line 24)	_____

SMART WORKSHEET FOR: 1040/1040SR Wks: Form 1040 or Form 1040-SR Worksheet

Excess Social Security and Tier I RRTA Tax Withheld Smart Worksheet	
<p>The calculated amount for Excess social security and tier 1 RRTA tax withheld could include a portion that needs to be removed. When a taxpayer has multiple W-2's, each with the same EIN, excess withholding can only be claimed if the Employer's Name's in box c of the W-2's reflect separate business entities. This could occur when a parent company has multiple subsidiaries, or when a temp agency issues W-2's for distinctly different jobs. If you have multiple W-2's with the same EIN, for the same taxpayer, and for the same job, reduce the amount calculated on Line A below by the excess withholdings from only those W-2's.</p>	
A Total Excess Social Security or Tier I RRTA tax withheld claimed as a credit	0.

SMART WORKSHEET FOR: Federal Information Worksheet

TurboTax for the Web Filing Status Smart Worksheet	
Check this box to override the filing status selected thru Interview	<input type="checkbox"/>
Marital Status	_____
Filing Status Selected	_____

SMART WORKSHEET FOR: Part-Year State Allocation Worksheet

Additional Other Income Allocation Smart Worksheet <i>* Enter the state of source for this income (See Tax Help)</i>						
	Federal Amount	Residency Info			* Src St	Allocated Amount
		From mm/dd	To mm/dd	Res St		
Y Not-for-profit (hobby) income . . . T						
Not-for-profit (hobby) income . . . S						
Z Stock options T						
Stock options S						
AA Miscellaneous other income . . . T						
Miscellaneous other income . . . S						

SMART WORKSHEET FOR: Form W-2 : Wage & Tax Statement (Copy 1)

Qualified Business Income Deduction Smart Worksheet <i>Completing this worksheet is only necessary if Statutory Employee (Box 13) has been checked and expenses will not be deducted on Schedule C ("No" checked in Part III, line 3).</i>			
A	Is this activity a qualified trade or business under Section 199A?	<input type="checkbox"/>	Yes <input type="checkbox"/> No
B	QBI worksheet to report	<input type="checkbox"/>	Yes <input type="checkbox"/> No
C	Specified Service Trade or Business (SSTB)?	<input type="checkbox"/>	Yes <input type="checkbox"/> No
D	I am not a statutory employee	<input type="checkbox"/>	

SMART WORKSHEET FOR: Form W-2 : Wage & Tax Statement (Copy 1)

Substitute Form W-2 Smart Worksheet

A Treat as a substitute W-2 and generate a form 4852

B Linked substitute W-2 Form 4852 ▶ _____

C Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"

D Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"

E QuickZoom to completed Form 4852 for reference ▶ _____

SMART WORKSHEET FOR: Tax and Interest Deduction Worksheet

Mortgage Interest Limited Smart Worksheet

If your mortgage interest deduction needs to be limited for one of the following reasons, use the Deductible Home Mortgage Interest Worksheet to determine the amount to be reported on lines **A, B,** and **C** below:

- The principal amount of your mortgage and home equity debt is over \$750,000 (\$375,000 if married filing separate), or
- You had home debt that was **not** used to buy, build or substantially improve your home that secures the loan

QuickZoom to Deductible Home Mortgage Interest Worksheet ▶

Does your mortgage interest need to be limited: Yes . . . No . . .

A Home mortgage interest and points reported on Form 1098:

1 Sum of lines 5a through 5d below _____

2 Limited amount to report on line 5a below _____

B Home mortgage interest not reported on Form 1098:

1 Sum of lines 6a and 6b below _____

2 Limited amount to report on line 6a below _____

C Points not reported on Form 1098:

1 Sum of lines 7a through 7c below _____

2 Limited amount to report on line 7a below _____

SMART WORKSHEET FOR: Misc Itemized Deductions Wks

Depreciation Smart Worksheet	
A	Enter Section 179 carryover from prior year _____
B	QuickZoom to the Asset Entry Worksheet ▶
C	QuickZoom to the Depreciation/Amortization Reports ▶
D	QuickZoom to Form 4562 for Schedule A ▶
E	Treat all MACRS assets for activity as qualified Indian reservation property? . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
F	Treat all assets acquired after Aug. 27, 2005 as qualified GO Zone property? <input type="checkbox"/> Regular <input type="checkbox"/> Extension <input checked="" type="checkbox"/> No
G	Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
H	Was this property located in a Qualified Disaster Area? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

SMART WORKSHEET FOR: Earned Income Credit Worksheet

Nontaxable Combat Pay Election Smart Worksheet	
QuickZoom to enter nontaxable combat pay on Form W-2 ▶	
A Taxpayer:	
1	Taxpayer, nontaxable combat pay _____
1a	Taxpayer, prior year nontaxable combat pay from 2019 _____
2 Election for earned income credit (EIC):	
	Elect taxpayer's nontaxable combat pay as earned income for EIC? ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No
3 Election for dependent care benefits (DCB):	
	Elect taxpayer's nontaxable combat pay as earned income for DCB? ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No
4 Election for child and dependent care credit:	
	Elect taxpayer's nontaxable combat pay as earned income for child and dependent care credit? ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No
B Spouse:	
1	Spouse, nontaxable combat pay _____
1a	Spouse, prior year nontaxable combat pay from 2019 _____
2 Election for earned income credit (EIC):	
	Elect spouse's nontaxable combat pay as earned income for EIC? ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No
3 Election for dependent care benefits (DCB):	
	Elect spouse's nontaxable combat pay as earned income for DCB? ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No
4 Election for child and dependent care credit:	
	Elect spouse's nontaxable combat pay as earned income for child and dependent care credit? ▶ <input type="checkbox"/> Yes <input type="checkbox"/> No
C You may compare the tax benefit of electing or not electing by checking a box on line A or line B and reviewing the overpayment or amount due below:	
Overpayment	_____ Amount due <u>20,099.</u>

SMART WORKSHEET FOR: Earned Income Credit Worksheet

Prior Year Earned Income Election Smart Worksheet
Election to use 2019 earned income for Earned Income Credit

The "Yes" box must be marked on Line A for 2019 earned income to be used for EIC calculations.

A Elect to use 2019 earned income for EIC **Yes** **No**

B Earned income for EIC from your 2019 return 117,079.

C Current year earned income for EIC 140,467.

If Line C is equal to or greater than Line B the taxpayer is not eligible to use 2019 earned income for EIC calculations.

D You may compare the tax benefit of electing to use 2021 Earned Income by checking the boxes on line A

Overpayment _____ Amount due 20,099.

SMART WORKSHEET FOR: Earned Income Credit Worksheet

Investment Income Smart Worksheet

A Taxable and tax exempt interest _____

B Dividend income 196.

C Capital gain net **income** 68,240.

D Royalty and rental of personal property net **income** _____

E Passive activity net **income**:

1 Rental real estate net income or loss _____

2 Farm rental net income or loss _____

3 Partnerships and S corporations net income or loss _____

4 Estates and trusts net income or loss _____

5 Total of lines 1 through 4 _____

6 Total passive activity net **income**, line 5 if greater than zero _____

F Interest and dividends from Forms 8814 _____

G Adjustments _____

H **Total investment income**, add lines A through G 68,436.

Is line H, **total investment income** over \$10,000?

No. You may take the credit.

Yes. Stop. You **cannot** take the credit.

SMART WORKSHEET FOR: Earned Income Credit Worksheet

Age Requirements Smart Worksheet

Filers without a qualifying child have certain age requirements. Answer the questions below:

Taxpayer is a qualified former foster youth, or a qualified homeless youth

Spouse is a qualified former foster youth, or a qualified homeless youth

You qualify as a specified student if you were enrolled in a program that leads to a degree, certificate, or other recognized educational credential and carried at least one-half the normal workload for your course of study during at least 5 calendar months of the year. For purposes of determining whether you were enrolled during at least 5 calendar months, count any month during which you were enrolled for at least part of the month. The 5 months do not need to be consecutive.

Taxpayer qualifies as a specified student for EIC purposes when filing without a qualifying child

Spouse qualifies as a specified student for EIC purposes when filing without a qualifying child

SMART WORKSHEET FOR: Earned Income Credit Worksheet

Married Filing Separately Smart Worksheet (with one or more qualifying child)

MFS filers with a qualifying child have additional requirements. Answer the questions below:

Did you and your spouse have the same principal residence for the last 6 months of 2021? **Yes** **No**

Are you legally separated according to your state law under a written separation agreement or a decree of separate maintenance and you lived apart from your spouse at the end of 2021? **Yes** **No**

SMART WORKSHEET FOR: Estimated Tax Payment Options

For Residents of Guam or the U.S. Virgin Islands Only

Permanent resident of Guam or U.S. Virgin Islands

Nonpermanent resident of Guam or U.S. Virgin Islands

Form 1099-B Worksheet (Robinhood Securities LLC) -- Capital Asset Sales Wksht (1)

QUICK

Continuation Statement

76	30303M102 META PLATFORMS, INC. CLASS A C OMMON STOCK 11	Check here if this summarizes multiple sales . . . ▶									
A	07/15/21	02/20/21	3,838.98	2,955.26	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
77	PLTR 07/16/2021 CALL \$23.00 1	Check here if this summarizes multiple sales . . . ▶									
A	07/16/21	07/13/21	0.00	31.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
78	BABA 07/16/2021 PUT \$205.00 1	Check here if this summarizes multiple sales . . . ▶									
A	07/16/21	07/16/21	216.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
79	UPWK 07/16/2021 CALL \$60.00 1	Check here if this summarizes multiple sales . . . ▶									
A	07/16/21	07/16/21	124.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
80	PLTR 07/23/2021 PUT \$21.50 3	Check here if this summarizes multiple sales . . . ▶									
A	07/23/21	07/23/21	149.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
81	BABA 08/06/2021 CALL \$210.00 1	Check here if this summarizes multiple sales . . . ▶									
A	08/06/21	08/06/21	165.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
82	PLTR 08/06/2021 CALL \$24.00 5	Check here if this summarizes multiple sales . . . ▶									
A	08/06/21	08/06/21	99.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
83	BABA 08/13/2021 CALL \$210.00 1	Check here if this summarizes multiple sales . . . ▶									
A	08/13/21	08/13/21	165.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											
84	FUBO 08/13/2021 CALL \$34.50 1	Check here if this summarizes multiple sales . . . ▶									
A	08/13/21	08/13/21	28.98	0.00	0.00						
		S	Yes X	No	Yes X	No					
Check to use worksheet (see help) ▶											O
0.00											X
X											

Form 1099-B Worksheet (Robinhood Securities LLC) -- Capital Asset Sales Wksht (1)

TQUICK

Continuation Statement

85	69608A108 PALANTIR TECHNOLOGIES INC. CLA SS A COMMON STOCK 500	Check here if this summarizes multiple sales . . . ▶					
A	08/13/21	VARIOUS	11,959.86	13,743.86	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
86	STNG 08/20/2021 CALL \$19.00 1	Check here if this summarizes multiple sales . . . ▶					
A	08/20/21	07/14/21	0.00	90.00	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
87	UPWK 08/20/2021 CALL \$65.00 1	Check here if this summarizes multiple sales . . . ▶					
A	08/20/21	08/20/21	211.98	0.00	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
88	PLTR 08/27/2021 CALL \$27.00 5	Check here if this summarizes multiple sales . . . ▶					
A	08/27/21	08/27/21	119.94	0.00	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
89	Y7542C130 SCORPIO TANKERS INC. 47	Check here if this summarizes multiple sales . . . ▶					
D	09/02/21	07/06/20	804.79	629.33	0.00		
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
90	Y7542C130 SCORPIO TANKERS INC. 53	Check here if this summarizes multiple sales . . . ▶					
A	09/02/21	09/29/20	922.36	581.30	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
91	Y8565N300 TEEKAY TANKERS LTD. 100	Check here if this summarizes multiple sales . . . ▶					
A	09/02/21	12/07/20	1,234.98	1,184.00	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
92	Y8565N300 TEEKAY TANKERS LTD. 100	Check here if this summarizes multiple sales . . . ▶					
A	09/03/21	12/07/20	1,241.13	1,184.00	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	
93	0160W02 ALIBABA GROUP HOLDING LIMITED AMERICAN DEPOSITARY SHARES, EA CH REPRESENTS EIGHT ORDINARY S 20	Check here if this summarizes multiple sales . . . ▶					
A	09/03/21	03/26/21	3,419.18	4,528.80	0.00		
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ▶		O					
0.00						X	

Form 1099-B Worksheet (Robinhood Securities LLC) -- Capital Asset Sales Wksht (1)

RQUICK

Continuation Statement

21A	PLTR 01/29/2021 CALL \$30.00 5	-2,610.04	0.00			-2,610.04	S
22A	Form 8949 exception: reported on Sch D Line 1a	894.94	0.00	BYPASS8949		894.94	S
23A	Form 8949 exception: reported on Sch D Line 1a	689.97	0.00	BYPASS8949		689.97	S
24A	Form 8949 exception: reported on Sch D Line 1a	174.98	0.00	BYPASS8949		174.98	S
25A	Form 8949 exception: reported on Sch D Line 1a	31,926.14	10,090.41	BYPASS8949		21,835.73	S
26A	Form 8949 exception: reported on Sch D Line 1a	1,019.90	0.00	BYPASS8949		1,019.90	S
27A	Form 8949 exception: reported on Sch D Line 1a	561.97	0.00	BYPASS8949		561.97	S
28A	Form 8949 exception: reported on Sch D Line 1a	338.98	0.00	BYPASS8949		338.98	S
29A	Form 8949 exception: reported on Sch D Line 1a	49.98	0.00	BYPASS8949		49.98	S
30A	Form 8949 exception: reported on Sch D Line 1a	179.98	0.00	BYPASS8949		179.98	S
31A	Form 8949 exception: reported on Sch D Line 1a	254.98	0.00	BYPASS8949		254.98	S
32A	Form 8949 exception: reported on Sch D Line 1a	53,028.82	52,917.60	BYPASS8949		111.22	S
33A	Form 8949 exception: reported on Sch D Line 1a	273.98	0.00	BYPASS8949		273.98	S
34A	Form 8949 exception: reported on Sch D Line 1a	143.98	0.00	BYPASS8949		143.98	S
35A	Form 8949 exception: reported on Sch D Line 1a	103.96	0.00	BYPASS8949		103.96	S
36A	Form 8949 exception: reported on Sch D Line 1a	55.98	0.00	BYPASS8949		55.98	S
37A	Form 8949 exception: reported on Sch D Line 1a	377.98	0.00	BYPASS8949		377.98	S
38A	Form 8949 exception: reported on Sch D Line 1a	59.98	0.00	BYPASS8949		59.98	S
39A	Form 8949 exception: reported on Sch D Line 1a	289.98	0.00	BYPASS8949		289.98	S
40A	Form 8949 exception: reported on Sch D Line 1a	334.96	0.00	BYPASS8949		334.96	S
41A	Form 8949 exception: reported on Sch D Line 1a	158.98	158.00	BYPASS8949		0.98	S
42A	Form 8949 exception: reported on Sch D Line 1a	224.95	0.00	BYPASS8949		224.95	S
43A	Form 8949 exception: reported on Sch D Line 1a	154.98	0.00	BYPASS8949		154.98	S
44A	Form 8949 exception: reported on Sch D Line 1a	209.94	0.00	BYPASS8949		209.94	S
45A	Form 8949 exception: reported on Sch D Line 1a	999.96	801.39	BYPASS8949		198.57	S
46A	Form 8949 exception: reported on Sch D Line 1a	174.98	210.00	BYPASS8949		-35.02	S
47A	Form 8949 exception: reported on Sch D Line 1a	75.92	84.00	BYPASS8949		-8.08	S
48A	Form 8949 exception: reported on Sch D Line 1a	226.98	0.00	BYPASS8949		226.98	S
49A	Form 8949 exception: reported on Sch D Line 1a	111.98	0.00	BYPASS8949		111.98	S
50A	Form 8949 exception: reported on Sch D Line 1a	199.97	0.00	BYPASS8949		199.97	S
51A	Form 8949 exception: reported on Sch D Line 1a	99.97	0.00	BYPASS8949		99.97	S
52A	Form 8949 exception: reported on Sch D Line 1a	65.98	0.00	BYPASS8949		65.98	S
53A	Form 8949 exception: reported on Sch D Line 1a	111.96	0.00	BYPASS8949		111.96	S
54A	Form 8949 exception: reported on Sch D Line 1a	109.98	0.00	BYPASS8949		109.98	S
55A	Form 8949 exception: reported on Sch D Line 1a	99.98	0.00	BYPASS8949		99.98	S
56A	Form 8949 exception: reported on Sch D Line 1a	10,249.86	6,825.81	BYPASS8949		3,424.05	S
57A	Form 8949 exception: reported on Sch D Line 1a	1,080.35	1,110.55	BYPASS8949		-30.20	S
58A	Form 8949 exception: reported on Sch D Line 1a	65.98	0.00	BYPASS8949		65.98	S
59A	Form 8949 exception: reported on Sch D Line 1a	179.98	0.00	BYPASS8949		179.98	S
60A	Form 8949 exception: reported on Sch D Line 1a	129.97	0.00	BYPASS8949		129.97	S
61A	Form 8949 exception: reported on Sch D Line 1a	7,699.88	6,026.18	BYPASS8949		1,673.70	S
62A	ROBINHOOD SECURITIES TECHNOLOGIES INC. CLAS A COMMON STOCK (N	13,307.84	14,033.33	W	1,627.34	901.85	S
63A	Form 8949 exception: reported on Sch D Line 1a	11,574.84	12,544.11	BYPASS8949		-969.27	S
64A	ROBINHOOD SECURITIES TECHNOLOGIES INC. CLAS A COMMON STOCK (N	4,841.94	5,315.56	W	438.10	-35.52	S
65A	Form 8949 exception: reported on Sch D Line 1a	41.99	0.00	BYPASS8949		41.99	S
66A	Form 8949 exception: reported on Sch D Line 1a	104.98	0.00	BYPASS8949		104.98	S
67A	Form 8949 exception: reported on Sch D Line 1a	124.98	0.00	BYPASS8949		124.98	S
68A	Form 8949 exception: reported on Sch D Line 1a	151.96	0.00	BYPASS8949		151.96	S
69A	Form 8949 exception: reported on Sch D Line 1a	3,467.95	1,882.02	BYPASS8949		1,585.93	S
70A	Form 8949 exception: reported on Sch D Line 1a	43.98	0.00	BYPASS8949		43.98	S
71A	Form 8949 exception: reported on Sch D Line 1a	49.98	0.00	BYPASS8949		49.98	S
72A	Form 8949 exception: reported on Sch D Line 1a	16,067.80	15,488.48	BYPASS8949		579.32	S
73D	Form 8949 exception: reported on Sch D Line 1a	938.81	533.90	BYPASS8949		404.91	L
74A	Form 8949 exception: reported on Sch D Line 1a	174.96	0.00	BYPASS8949		174.96	S

Form 1099-B Worksheet (Robinhood Securities LLC) -- Capital Asset Sales Wksht (1)

RQUICK

Continuation Statement

75A	Form 8949 exception: reported on Sch D Line la	3,531.98	2,686.60	BYPASS8949		845.38	S
76A	Form 8949 exception: reported on Sch D Line la	3,838.98	2,955.26	BYPASS8949		883.72	S
77A	Form 8949 exception: reported on Sch D Line la	0.00	31.00	BYPASS8949		-31.00	S
78A	Form 8949 exception: reported on Sch D Line la	216.98	0.00	BYPASS8949		216.98	S
79A	Form 8949 exception: reported on Sch D Line la	124.98	0.00	BYPASS8949		124.98	S
80A	Form 8949 exception: reported on Sch D Line la	149.98	0.00	BYPASS8949		149.98	S
81A	Form 8949 exception: reported on Sch D Line la	165.98	0.00	BYPASS8949		165.98	S
82A	Form 8949 exception: reported on Sch D Line la	99.98	0.00	BYPASS8949		99.98	S
83A	Form 8949 exception: reported on Sch D Line la	165.98	0.00	BYPASS8949		165.98	S
84A	Form 8949 exception: reported on Sch D Line la	28.98	0.00	BYPASS8949		28.98	S
85A	Form 8949 exception: reported on Sch D Line la	11,959.86	13,743.86	BYPASS8949		-1,784.00	S
86A	Form 8949 exception: reported on Sch D Line la	0.00	90.00	BYPASS8949		-90.00	S
87A	Form 8949 exception: reported on Sch D Line la	211.98	0.00	BYPASS8949		211.98	S
88A	Form 8949 exception: reported on Sch D Line la	119.94	0.00	BYPASS8949		119.94	S
89D	Form 8949 exception: reported on Sch D Line la	804.79	629.33	BYPASS8949		175.46	L
90A	Form 8949 exception: reported on Sch D Line la	922.36	581.30	BYPASS8949		341.06	S
91A	Form 8949 exception: reported on Sch D Line la	1,234.98	1,184.00	BYPASS8949		50.98	S
92A	Form 8949 exception: reported on Sch D Line la	1,241.13	1,184.00	BYPASS8949		57.13	S
93A	Form 8949 exception: reported on Sch D Line la	3,419.18	4,528.80	BYPASS8949		-1,109.62	S
94A	Form 8949 exception: reported on Sch D Line la	99.98	0.00	BYPASS8949		99.98	S
95A	Form 8949 exception: reported on Sch D Line la	46.98	0.00	BYPASS8949		46.98	S
96A	Form 8949 exception: reported on Sch D Line la	109.96	0.00	BYPASS8949		109.96	S
97A	Form 8949 exception: reported on Sch D Line la	13,614.85	12,360.03	BYPASS8949		1,254.82	S
98A	Form 8949 exception: reported on Sch D Line la	99.98	0.00	BYPASS8949		99.98	S
99A	Form 8949 exception: reported on Sch D Line la	27,052.82	37,934.24	BYPASS8949		-10,881.42	S
100A	Form 8949 exception: reported on Sch D Line la	191.98	0.00	BYPASS8949		191.98	S
101A	Form 8949 exception: reported on Sch D Line la	189.96	0.00	BYPASS8949		189.96	S
102A	Form 8949 exception: reported on Sch D Line la	0.00	69.00	BYPASS8949		-69.00	S
103A	Form 8949 exception: reported on Sch D Line la	252.98	0.00	BYPASS8949		252.98	S
104A	Form 8949 exception: reported on Sch D Line la	99.98	0.00	BYPASS8949		99.98	S
105A	Form 8949 exception: reported on Sch D Line la	1,410.10	1,184.00	BYPASS8949		226.10	S
106A	Form 8949 exception: reported on Sch D Line la	1,484.04	991.04	BYPASS8949		493.00	S
107A	Form 8949 exception: reported on Sch D Line la	5,964.14	5,179.33	BYPASS8949		784.81	S
108A	Form 8949 exception: reported on Sch D Line la	1,760.68	1,212.61	BYPASS8949		548.07	S
109A	Form 8949 exception: reported on Sch D Line la	494.98	0.00	BYPASS8949		494.98	S
110D	Form 8949 exception: reported on Sch D Line la	5,006.93	3,198.92	BYPASS8949		1,808.01	L
111A	Form 8949 exception: reported on Sch D Line la	39.98	0.00	BYPASS8949		39.98	S
112A	Form 8949 exception: reported on Sch D Line la	164.98	0.00	BYPASS8949		164.98	S
113A	Form 8949 exception: reported on Sch D Line la	119.98	0.00	BYPASS8949		119.98	S
114D	Form 8949 exception: reported on Sch D Line la	2,951.46	1,761.41	BYPASS8949		1,190.05	L
115D	Form 8949 exception: reported on Sch D Line la	3,699.98	1,454.80	BYPASS8949		2,245.18	L
116A	Form 8949 exception: reported on Sch D Line la	2,999.96	3,031.52	BYPASS8949		-31.56	S
117D	Form 8949 exception: reported on Sch D Line la	1,894.70	1,301.41	BYPASS8949		593.29	L
118A	Form 8949 exception: reported on Sch D Line la	366.59	505.32	BYPASS8949		-138.73	S
119D	Form 8949 exception: reported on Sch D Line la	1,864.17	1,337.87	BYPASS8949		526.30	L
120A	Form 8949 exception: reported on Sch D Line la	204.98	0.00	BYPASS8949		204.98	S
121A	Form 8949 exception: reported on Sch D Line la	124.98	0.00	BYPASS8949		124.98	S
122A	Form 8949 exception: reported on Sch D Line la	114.98	0.00	BYPASS8949		114.98	S
123A	Form 8949 exception: reported on Sch D Line la	147.98	0.00	BYPASS8949		147.98	S
124D	Form 8949 exception: reported on Sch D Line la	1,337.21	857.61	BYPASS8949		479.60	L
125A	Form 8949 exception: reported on Sch D Line la	714.98	0.00	BYPASS8949		714.98	S
126A	Form 8949 exception: reported on Sch D Line la	119.98	0.00	BYPASS8949		119.98	S
127A	Form 8949 exception: reported on Sch D Line la	71.98	0.00	BYPASS8949		71.98	S
128A	Form 8949 exception: reported on Sch D Line la	51.96	0.00	BYPASS8949		51.96	S

Form 1099-B Worksheet (VANGUARD MARKETING CORPORATION) -- Capital Asset Sales Wksht (1)
TQUICK Continuation Statement

Table with columns for asset ID, description, dates, and sales amounts. Includes rows for assets 5 through 13, each with a 'Check here if this summarizes multiple sales' field and a 'Check to use worksheet' field.

Form 1099-B Worksheet (VANGUARD MARKETING CORPORATION) -- Capital Asset Sales Wksht (1)
TQUICK Continuation Statement

Table with 10 columns: Line number, Description, Date, Basis, Proceeds, and various checkboxes. Rows 14-22 contain asset sales for SCORPIO TANKERS INC and NEXTECH AR SOLUTIONS.

Form 1099-B Worksheet (VANGUARD MARKETING CORPORATION) -- Capital Asset Sales Wksht (1) QUICK Continuation Statement

23	65343B104 NEXTECH AR SOLUTIONS 1000	Check here if this summarizes multiple sales . . . ▶				
A	05/17/21	VARIOUS	1,990.99	5,554.40	0.00	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶		O				
0.00						X
X						
24	69608A108 PALANTIR TECHS INC A 315	Check here if this summarizes multiple sales . . . ▶				
A	05/20/21	VARIOUS	6,442.32	4,273.96	0.00	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶		O				
0.00						X
X						
25	65343B104 NEXTECH AR SOLUTIONS 1000	Check here if this summarizes multiple sales . . . ▶				
A	06/11/21	VARIOUS	2,779.99	5,084.72	0.00	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶		O				
0.00						X
X						
26	65343B104 NEXTECH AR SOLUTIONS 2500	Check here if this summarizes multiple sales . . . ▶				
A	06/15/21	VARIOUS	7,149.96	12,753.31	0.00	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶		O				
0.00						X
X						
27	18452B209 CLEANS PARK INC NEW 120	Check here if this summarizes multiple sales . . . ▶				
A	09/09/21	06/15/21	1,616.39	2,296.20	0.00	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶		O				
0.00						X
X						
28	34986W106 FORWARDLY INC 37080	Check here if this summarizes multiple sales . . . ▶				
A	11/19/21	VARIOUS	3,707.98	9,531.79	0.00	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶		O				
0.00						X
X						

Form 1099-B Worksheet (VANGUARD MARKETING CORPORATION) -- Capital Asset Sales Wksht (1) QUICK Continuation Statement

20A	7542C130 SCORPIO TANKERS INC NEW 51	963.23	577.24		385.99	S
21A	91688F104 UPWORK INC 50	2,457.49	718.50		1,738.99	S
22A	91688F104 UPWORK INC 100	4,949.97	1,451.36		3,498.61	S
23A	65343B104 NEXTECH AR SOLUTIONS 1000	1,990.99	5,554.40		-3,563.41	S
24A	69608A108 PALANTIR TECHS INC A 315	6,442.32	4,273.96		2,168.36	S
25A	65343B104 NEXTECH AR SOLUTIONS 1000	2,779.99	5,084.72		-2,304.73	S
26A	65343B104 NEXTECH AR SOLUTIONS 2500	7,149.96	12,753.31		-5,603.35	S
27A	18452B209 CLEANS PARK INC NEW 120	1,616.39	2,296.20		-679.81	S
28A	34986W106 FORWARDLY INC 37080	3,707.98	9,531.79		-5,823.81	S

Form 1099-B Worksheet (E*TRADE SECURITIES LLC) -- Capital Asset Sales Wksht (1)

QUICK

Continuation Statement

5	INTEL CORP 158	Check here if this summarizes multiple sales . . . ▶										
A	05/12/21	08/19/20	8,571.45	6,529.00								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		O										
	AZ										X	
X												
6	INTEL CORP 47	Check here if this summarizes multiple sales . . . ▶										
A	09/13/21	08/19/21	2,577.08	2,082.40								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		O										
	AZ										X	
X												

Form 1099-B Worksheet (Voyager digital) -- Capital Asset Sales Wksht (1)

QUICK

Continuation Statement

5	2488.08 of DGB	Check here if this summarizes multiple sales . . . ▶										
C	09/12/21	02/05/21	140.82	100.00								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		CRYPTOC										
X												
6	11017.00 of DGB	Check here if this summarizes multiple sales . . . ▶										
C	09/12/21	02/08/21	623.56	500.00								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		CRYPTOC										
X												
7	4837.29 of DGB	Check here if this summarizes multiple sales . . . ▶										
C	09/12/21	02/08/21	273.79	250.00								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		CRYPTOC										
X												
8	2514.85 of DGB	Check here if this summarizes multiple sales . . . ▶										
C	09/12/21	02/08/21	142.34	130.98								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		CRYPTOC										
X												
9	200.00 of DGB	Check here if this summarizes multiple sales . . . ▶										
C	10/08/21	02/08/21	10.20	10.42								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		CRYPTOC										
X												
10	2085.30 of DGB	Check here if this summarizes multiple sales . . . ▶										
C	10/14/21	02/08/21	99.80	108.61								
		S	Yes	X	No	Yes	X	No				
Check to use worksheet (see help) ▶												
		CRYPTOC										
X												

Form 1099-B Worksheet (Voyager digital) -- Capital Asset Sales Wksht (1)
TQUICK

Continuation Statement

<input type="checkbox"/>	38	2840.56 of DGB	Check here if this summarizes multiple sales . . . ▶					
C	11/10/21	05/16/21	166.71	300.00				
		S	Yes	<input checked="" type="checkbox"/> No	Yes	<input checked="" type="checkbox"/> No		
Check to use worksheet (see help) ▶		CRYPTOC						
<input checked="" type="checkbox"/>	39	1940.87 of DGB	Check here if this summarizes multiple sales . . . ▶					
C	11/10/21	05/18/21	113.90	200.00				
		S	Yes	<input checked="" type="checkbox"/> No	Yes	<input checked="" type="checkbox"/> No		
Check to use worksheet (see help) ▶		CRYPTOC						
<input checked="" type="checkbox"/>	40	1557.03 of DGB	Check here if this summarizes multiple sales . . . ▶					
C	11/10/21	05/18/21	91.38	150.00				
		S	Yes	<input checked="" type="checkbox"/> No	Yes	<input checked="" type="checkbox"/> No		
Check to use worksheet (see help) ▶		CRYPTOC						
<input checked="" type="checkbox"/>	41	1682.54 of DGB	Check here if this summarizes multiple sales . . . ▶					
C	11/10/21	05/19/21	98.74	150.00				
		S	Yes	<input checked="" type="checkbox"/> No	Yes	<input checked="" type="checkbox"/> No		
Check to use worksheet (see help) ▶		CRYPTOC						
<input checked="" type="checkbox"/>	42	11247.78 of DGB	Check here if this summarizes multiple sales . . . ▶					
C	11/10/21	05/23/21	660.10	600.00				
		S	Yes	<input checked="" type="checkbox"/> No	Yes	<input checked="" type="checkbox"/> No		
Check to use worksheet (see help) ▶		CRYPTOC						
<input checked="" type="checkbox"/>	43	1785.31 of DGB	Check here if this summarizes multiple sales . . . ▶					
C	11/10/21	06/12/21	104.78	97.46				
		S	Yes	<input checked="" type="checkbox"/> No	Yes	<input checked="" type="checkbox"/> No		
Check to use worksheet (see help) ▶		CRYPTOC						
<input checked="" type="checkbox"/>								

Form 1099-B Worksheet (Voyager digital) -- Capital Asset Sales Wksht (1)
RQUICK

Continuation Statement

20C	1317.92 of DGB	63.07	100.00			-36.93S
21C	1322.93 of DGB	63.31	100.00			-36.69S
22C	6750.58 of DGB	323.07	500.00			-176.93S
23C	6863.26 of DGB	328.47	500.00			-171.53S
24C	6848.42 of DGB	327.76	500.00			-172.24S
25C	7250.78 of DGB	347.01	500.00			-152.99S
26C	4941.19 of DGB	236.48	306.86			-70.38S
27C	368324.10 of SHIB	31.31	10.00			21.31S
28C	3110.14 of DGB	182.53	193.14			-10.61S
29C	5543.85 of DGB	325.35	500.00			-174.65S
30C	1693.82 of DGB	99.41	200.00			-100.59S
31C	2582.63 of DGB	151.57	300.00			-148.43S
32C	3036.87 of DGB	178.23	300.00			-121.77S

Form 1099-B Worksheet (Voyager digital) -- Capital Asset Sales Wksht (1)**RQUICK****Continuation Statement**

33C	2022.95 of DGB	118.72	200.00			-81.28S
34C	4190.41 of DGB	245.92	500.00			-254.08S
35C	2939.09 of DGB	172.49	350.00			-177.51S
36C	1562.52 of DGB	91.70	200.00			-108.30S
37C	2263.62 of DGB	132.85	250.00			-117.15S
38C	2840.56 of DGB	166.71	300.00			-133.29S
39C	1940.87 of DGB	113.90	200.00			-86.10S
40C	1557.03 of DGB	91.38	150.00			-58.62S
41C	1682.54 of DGB	98.74	150.00			-51.26S
42C	11247.78 of DGB	660.10	600.00			60.10S
43C	1785.31 of DGB	104.78	97.46			7.32S

DO NOT STAPLE ANY ITEMS TO THE RETURN.

82F Check box 82F if filing under extension OR FISCAL YEAR BEGINNING 2021 AND ENDING 66F

Your First Name and Middle Initial Arpan Last Name Kundu Your Social Security Number 736 07 2154
Spouse's First Name and Middle Initial (if box 4 or 6 checked) Last Name Enter your SSN(s) Spouse's Social Security No.

Current Home Address - number and street, rural route Apt. No. Daytime Phone (with area code)
4909 W Joshua Blvd 1051 94 (330) 550-3876
City, Town or Post Office State ZIP Code Last Names Used in Last Four Prior Year(s) (if different)
Chandler AZ 85226-6020 97

FILING STATUS: 4 Married filing joint return 4a Injured Spouse Protection of Joint Overpayment
5 Head of household. Enter name of qualifying child or dependent on next line:
6 Married filing separate return. Enter spouse's name and Social Security Number above.
7 Single
Enter the number claimed. Do not put a check mark.
8 Age 65 or over (you and/or spouse) If completing lines 8, 9, and 11a, also complete lines 38, 39, and 41. For lines 10a and 10b, also complete line 49.
9 Blind (you and/or spouse)
10a Dependents: Under age of 17. 10b Dependents: Age 17 and over.
11a Qualifying parents and grandparents
81 PM 80 RCVD

(Box 10a and 10b): Dependent Information. See instructions. For more space, check the box and complete page 4, Part 1.

Table with 6 columns: (a) FIRST AND LAST NAME, (b) SOCIAL SECURITY NO., (c) RELATIONSHIP, (d) NO. OF MONTHS LIVED IN YOUR HOME IN 2021, (e) Dependent Age included in: 1 (Box 10a), 2 (Box 10b), (f) IF YOU DID NOT CLAIM THIS PERSON ON YOUR FEDERAL RETURN DUE TO EDUCATIONAL CREDITS.

(Box 11a): Qualifying parents and grandparents. See instructions. For more space, check the box and complete page 4, Part 2.

Table with 6 columns: (a) FIRST AND LAST NAME, (b) SOCIAL SECURITY NO., (c) RELATIONSHIP, (d) NO. OF MONTHS LIVED IN YOUR HOME IN 2021, (e) IF AGE 65 OR OVER, (f) IF DIED IN 2021.

Table with 3 columns: Line number, Description, Amount. Includes lines 12-24 for Federal adjusted gross income, net capital gain, and various adjustments.

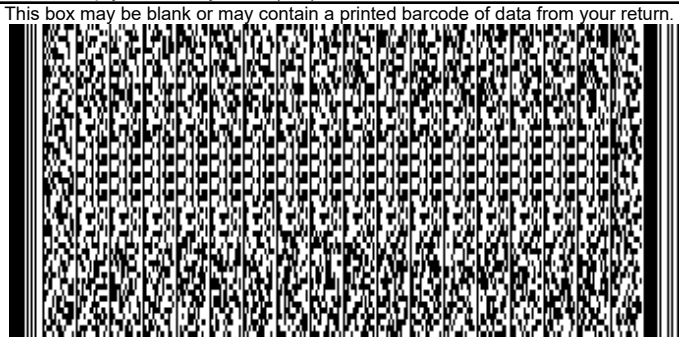


Table with 3 columns: Line number, Description, Amount. Includes lines 25-34 for various deductions and adjustments.

Place any required federal and AZ schedules or other documents after Form 140.

Exemptions 8, 9, and 11a - Dependents 10a and 10b

Additions

Subtractions

► Keep for your records

Name as Shown on Return

Arpan Kundu

Social Security Number

736-07-2154

Family Income Tax Credit Worksheet

- A Number of dependents listed as type "A", "D", or "E" _____
- B If filing status is MFJ, enter the number 2 here. Otherwise, enter the number 1 here _____
- C Add lines A and B _____
- D Multiply line C by \$40 _____
- E Enter \$240 if MFJ or HOH; enter \$120 if Single or MFS _____
- F Lesser of line D or line E. Enter here and on Form 140, line 50 _____

Arizona Information Worksheet

2021

Keep for your records

Part I - Personal Information

Taxpayer:

First Name Arpan
Middle Initial Suffix
Last Name Kundu
Social Security No 736-07-2154
Date of Birth 08/06/1990
Date of Death
Daytime Phone (330)550-3876
Extension

Spouse:

First Name
Middle Initial Suffix
Last Name
Social Security No
Date of Birth
Date of Death
Daytime Phone
Extension

Home Phone
Print this daytime phone on forms [X] Taxpayer daytime [] Spouse daytime [] Home
Street Address . 4909 W Joshua Blvd Apt No. . 1051
City Chandler State AZ ZIP Code . 85226-6020

Last name(s) in prior years if different from name(s) used in current year

Part II - Main Form

- [X] Form 140: Resident Tax Return (Long form)
[] Form 140A: Resident Tax Return (Short form)
[] Form 140NR: Nonresident Tax Return
Enter Nonresident income allocations on Form 140NR
[] Form 140PY: Part-Year Resident Tax Return
Dates of Residency: From: To:
Other states of residency:
Other country of residency:
Enter Part-Year Resident income allocations on Form 140PY
[] Form 140PTC: Full-Year Resident Property Tax Refund (Credit Claim) Only.

Small Business Income Tax Returns:

- [] Form 140-SBI: Small Business Income Tax Return (Resident)
QuickZoom to Form 204-SBI: Small Business Income Tax Extension Payment

Military personnel and composite return filers:

- [] You were active duty in Arizona and are filing part-year or nonresident return (Form 140NR or 140PY)
[] You are filing a composite return on Form 140NR

Part III - Filing Status

- Married filing joint return
 - Injured spouse protection of joint overpayment (Form 203) ▶ _____
- Head of household
 - Child's First name _____ MI _____ Last Name _____ Suffix _____
 - Head of household and married in 2021
- Married filing separate return
 - Spouse itemized deductions
 - Married filing separate with one spouse claiming at least one dependent
- Single

Arpan Kundu _____ 736-07-2154 Page 2

Part IV - Other Information

- Your Arizona gross income for **2020** was in excess of \$75,000 (\$150,000 if MFJ)
- Someone (such as taxpayer's parent) can claim taxpayer as a dependent
- You qualify as a farmer or fisherman for federal tax purposes
- Itemize even if itemized deductions are less than standard deduction
- Take the standard deduction even if less than itemized deductions
- Check this box if you are a first time Arizona income tax filer

Increased Excise Tax Credit

- You were sentenced to 60 days or more in a county, state or federal prison during tax year 2021
Credit claimed by another member of the household _____

Voluntary Gifts

- | | | | |
|----|--|----|-------|
| 1 | Solutions Teams Assigned to Schools Fund | 1 | _____ |
| 2 | Arizona Wildlife Fund | 2 | _____ |
| 3 | Child Abuse Prevention Fund | 3 | _____ |
| 4 | Domestic Violence Services | 4 | _____ |
| 5 | I Didn't Pay Enough Fund | 5 | _____ |
| 6 | Neighbors Helping Neighbors Fund | 6 | _____ |
| 7 | Special Olympics Fund | 7 | _____ |
| 8 | Veterans' Donations Fund | 8 | _____ |
| 9 | Sustainable State Parks and Road Fund | 9 | _____ |
| 10 | Spay/Neuter of Animals | 10 | _____ |
| 11 | Political Gift - select party below | 11 | _____ |
| | <input type="checkbox"/> Democratic | | |
| | <input type="checkbox"/> Libertarian | | |
| | <input type="checkbox"/> Republican | | |

Part V - Electronic Filing Information

New! E-file consent disclosure:

By using a computer system and software to prepare and transmit return(s) electronically, I consent to the disclosure of all information pertaining to my use of the system and software to the Arizona Department of Revenue, as applicable by law, and to the transmission of my tax return(s).

- Yes No**
- Federal PIN(s) will be used (See help)

Part VI - Direct Deposit Information or Direct Debit Information

- Yes No**
- Do you want to elect direct deposit of state tax refund?
 - Do you want direct debit of state tax payment (Electronic Filing Only)?

Name of Financial Institution (optional) Chase
Account type Checking Savings
Routing number 074000010
Account number. 252175272
Enter the payment date to withdraw from the account above 03/30/2022
State balance-due amount from this return _____

International ACH Transactions

Yes No
 Will the funds for this refund (or payment) go to (or come from) an account outside the U.S.?

Small Business Income Tax Returns

Yes No
 Do you want to elect direct deposit of state tax refund?
 Do you want direct debit of state tax payment (Electronic Filing Only)?

Name of Financial Institution (optional) _____
Account type Checking Savings
Routing number _____
Account number. _____
Enter the payment date to withdraw from the account above _____
State balance-due amount from this return _____

International ACH Transactions for SBI Return

Yes No
 Will the funds for this refund (or payment) go to (or come from) an account outside the U.S.?

Part VII – Extension Status

Yes **No**

Has the tax return due date been extended by filing IRS Form 4868?

Extended due date _____

QuickZoom to Form 204: Application for Filing Extension ▶ _____

Part VIII – Amended Return

You are filing an Arizona amended return for 2021 (See Tax Help)

Current tax year you are amending _____

Payment with original return _____

Overpayment from original return _____

QuickZoom to Form 140X: Individual Amended Income Tax Return ▶ _____

► Keep for your records

Name(s) Shown on Return
Arpan Kundu

Your Social Security Number
736-07-2154

Part I 2022 Estimated Tax Amount Options to be paid before January 17, 2023

1 Select One of Five Ways to Calculate the Required Annual Payment for 2022 Estimates:

- a 100% of **2021** taxes (default, see Tax Help) 7,620.
- b 100% of tax on **2022** estimated taxable income 7,620.
- c 90% of tax on **2022** estimated taxable income 6,858.
- d Equal to 100% of overpayment (no vouchers) _____
- e Enter total amount you want to use for estimates and check box _____

Voluntary Payments:

Method 1: If federal Form 1040ES was filed, Arizona estimated payments can be calculated based on a percentage (10, 15 or 20%) of the federal estimated tax paid. To choose this option, enter the percentage to be used and the total amount of federal estimate tax on lines a and b below. Then check the box on line 1e.

- a Enter percentage to calculate the estimated vouchers _____ %
- b Enter total federal estimates due 24,056.

Method 2: Installments may be filed on or before the due dates (April 18, June 15, September 15, and January 17). To choose this option, check the box and enter the total amount to be paid with estimates on line 1e. Then, on Part IV, line 2, check the box indicating the number of installments to be used.

Method 3: Estimated tax payments can be made as a single, lump-sum payment before January 17. To choose this option, check the box and enter the total to be paid with estimates on line 1e. Then check the box on Part IV, line 2, column 4 indicating the January payment is due next.

2 Selected estimated tax amount:

- a 2022 Required Annual Payment based on your choice above 7,620.
- b Estimated amount of 2022 state income tax withholding 3,631.
- c **Total of estimated tax payments required for 2022** (line 2a less line 2b) 3,989.

3 Select Estimated Tax Payment option:

- a Calculate estimates if Arizona gross income in 2021 and expected 2022 gross income exceeds \$75,000 (\$150,000 if MFJ) (default)
- b Calculate estimates if _____ (specify amount) or more
- c Calculate estimates regardless of amount
- d Do **not** calculate estimates

Part II Overpayment Application Options

1 Amount of overpayment available (Arizona Form 140, 140NR, or 140PY) 0.

2 Select Overpayment Application Amount Option:

- a Apply none (refund entire overpayment)
- b Apply all (increase estimate if required)
- c Apply to extent of total estimated tax and refund excess 3,992.
- d Apply to extent of first quarter amount and refund excess 998.
- e Enter amount you want to apply
- f Amount applied to 2022 estimated tax 0.
- g Overpayment to be refunded (line 1 less line 2f) 0.

3 Select Overpayment Application Sequence:

- a ◀ Consecutively b ◀ Evenly

Part III Rounding and Printing Options

1 Select Rounding Option:

- a ◀ Round up to next \$1 b ◀ Round up to next \$10 c ◀ Round up to next \$100 d ◀ Round to nearest \$1

2 Select Voucher Printing Option:

- a ◀ Print (per Part I, lines 3a - c) b ◀ Print only name, etc. c ◀ Do **not** print vouchers

Part IV Estimated Tax Payment Summary

	1 Apr 18, 2022	2 Jun 15, 2022	3 Sep 15, 2022	4 Jan 17, 2023	Total
1 If you have already made payments, enter amounts					
2 Indicate which payment is due next. (e.g. if it is now April 25, check col. 2)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3 Required Payment	998.	998.	998.	998.	3,992.
4 Overpayment applied	0.	0.	0.	0.	0.
5 Net payment due	998.	998.	998.	998.	3,992.
6 Voucher amounts					

Part V Changes to Income, Deductions and Withholding for 2022

2021 income and deductions are shown in the '2021 Actual' column below.

***Caution:** For each line in the '2022 Estimated' column, enter the estimated 2022 amount **if different** from 2021. Otherwise, the '2021 Actual' amount will be used for that line. If zero, you **must** enter zero.

	2021 Actual	*2022 Estimated
1 Use the estimated tax worksheet attached to IRS Form 1040ES and <i>enter here the amount shown as income on your federal worksheet</i>	209,022.	
Additions		
2 Non-Arizona municipal interest		
3 Partnership Income		
4 Total federal depreciation		
5 Other additions to income		
Subtractions		
6 If you elected to report small business income on Form 140-SBI, enter SBI from Schedules B,C,D,E,F and 4797		
7 Amounts received as annuities from certain federal, Arizona state or local government retirement and disability funds (up to \$2,500) that are subject to federal tax.		
8 Interest income on obligations of the United States (e.g. U.S. savings bonds, treasury bills, etc)		
9 Benefits, annuities, and pensions for retired/retainer pay of the uniformed services (up to \$3,500) that are subject to federal tax		
10 U.S. Social Security benefits or railroad retirement act benefits included as income on federal return		
11 Other exempt income	10.	
Deductions		
12 If you plan to itemize deductions, <i>enter the estimated total of your deductions</i> . If you do not plan to itemize deductions, <i>see the instructions for the allowable 2021 standard deduction</i>	12,550.	
13 Arizona tax withholding	3,631.	
Credits		
14 Credits		

Part VI Filing Status and Exemptions for 2022

- 1 Choose 2022 filing status:
 Married filing jointly
 Head of household
 Check the box if head of household and married in 2022
 Married filing separately
 Check box if married filing separate with one spouse claiming at least one dependent
 Single
- 2 a Number of exemptions for age 65 and over to be claimed in 2022 (taxpayer or spouse only) 0
 b Number of blind exemptions to be claimed in 2022 0
 c Number of other exemptions to be claimed in 2022 _____
 d Number of qualifying parents and ancestors of parents to be claimed in 2022 _____
- 3 **Part-year and Nonresident Filers only:** Arizona percentage from Form 140NR or Form 140PY _____ %

Part VII 2022 Estimated Taxable Income and Tax (140ES)

1	Amount shown as income on your federal estimated tax worksheet	209,022.
2	Adjustments to income:	
a	Total additions	
b	Total subtractions <u>10.</u>	
c	Net adjustments	-10.
3	Deductions <u>12,550.</u>	
4	Dependent exemptions <u>0.</u>	
5	Total deductions and exemptions	12,550.
6	Estimated Arizona taxable income (line 1 plus line 2c minus line 5)	196,462.
7	Tax on amount from line 6	7,620.
8	Credits	
9	Subtract line 8 from line 7. Enter the difference (no less than 0). This is your 2022 tax based on your estimate of 2022 income	7,620.

Part VIII 2022 Estimated Taxable Income and Tax (140ES-SBI)

1	Use the estimated tax worksheet attached to IRS Form 1040ES. Enter the portion reported on federal Schedules B, C, D (related to SBI), E, F and Form 4797	_____
2	Adjustments to AZ Small Business Income:	
a	Total additions	_____
b	Total subtractions	_____
c	Net adjustments	_____
3	Estimated Arizona taxable income (line 1 plus line 2c)	_____
4	Multiply the amount on line 3 by 3.5%. to calculate your estimated tax liability	_____
5	Credits	_____
6	Subtract line 5 from line 4. Enter the difference (no less than 0). This is your 2022 SBI tax based on your estimate of 2022 SBI income	_____

1	2	3	4
Apr 18, 2022	Jun 15, 2022	Sep 15, 2022	Jan 17, 2023
_____	_____	_____	_____

Tax Payments Worksheet

2021

▶ Keep for your records

Name Arpan Kundu	Social Security Number 736-07-2154
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Tax Payments for the Current Year

		State	
		Date	Payment
1	First Payment		
2	Second Payment		
3	Third Payment		
4	Fourth Payment		
Additional Payments			
5	Payment		
	Payment		
	Payment		
	Payment		
	Payment		
6	Overpayment from previous year applied to current year	6	
7	Amount paid with current year extension	7	
8	Total tax payments	8	

Income Taxes Withheld for the Current Year

9	State withholding on Forms W-2	9	3,631.
10	State withholding on Forms W-2G	10	
11	State withholding on Forms 1099-R	11	
12 a	State withholding on Forms 1099-MISC	12 a	
b	State withholding on Forms 1099-NEC	b	
c	State withholding on Forms 1099-G	c	
d	State withholding on Forms 1099-K	d	
13	Other state tax withholding	13	
14	Total income tax withheld	14	3,631.
15	Date return will be filed and balance paid	15	

Tax Summary
 ► Keep for your records

2021

Name(s) Arpan Kundu	
<hr/>	
Federal adjusted gross income	209,022.
Arizona adjusted gross income	209,012.
Itemized or standard deduction	12,550.
Arizona taxable income	196,462.
Non-refundable Credits	
Balance of Tax	7,620.
Total payments and refundable credits	3,631.
Tax due	3,989.
Overpayment	
Amount applied to estimates	
Voluntary contributions	
Penalties	
Refund	
Amount owed	3,989.
<hr/>	
AZ Small Business Income Tax Return	
Arizona small business taxable income	
SBI Non-refundable Credits	
SBI Balance of Tax	
SBI total payments and refundable credits	
SBI Overpayment	
SBI amount applied to estimates	
SBI Refund	
SBI Amount owed	
<hr/>	
Net Balance Due Form 140 and Form 140-SBI	
Net Refund Form 140 and Form 140-SBI	
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Smart Worksheets From 2021 Arizona Tax Return

SMART WORKSHEET FOR: Form 140: Resident Personal Return (Copy 1)

Smart Worksheet for Net Long-Term Capital Gain Subtraction for Assets Acquired After December 31, 2011

2021 Original return 2021 Amended return

Important

- If you elected to file the Arizona Small Business Income Tax Return (Form 140-SBI), only claim the subtraction on this return if the net capital gain to which the subtraction relates was not moved to the Arizona Small Business Income Tax Return.
- If you cannot determine the acquisition date of an asset, including mutual funds, the long-term capital gain from that asset does not qualify for the allowable subtraction. For the purpose of the allowable subtraction, these assets are considered to have been acquired before January 1, 2012
- An asset acquired by gift or inheritance is considered acquired on the date it was acquired by gift-giver or the deceased individual
- If you receive Form(s) 165 Schedule K-1 from a partnership, 120S Schedule K-1 from an S Corporation, or 141AZ Schedule K-1 from an estate or trust, be sure to include those qualifying net long-term capital gain amounts in your computation

Do not include any short-term capital gains or (losses) in this worksheet

- A** Enter the total net long-term capital gain or (loss) from assets acquired after December 31, 2011, and included in federal adjusted gross income. 0.
- B** Enter the amount of net long-term capital (loss) derived from the exchange of one kind of legal tender for another kind of legal tender from assets acquired after December 31, 2011, and included on the schedule "Other Additions to Arizona Gross Income", on Form 140, page 5, item "O". _____
- C** Enter the amount of net long-term capital gain derived from investment in qualified small business from assets acquired after December 31, 2011, and included in the subtraction on Arizona Form 140, line 25 500.
- D** Enter the amount of net long-term capital gain derived from the exchange of one kind of legal tender for another kind of legal tender from assets acquired after December 31, 2011, and included on the schedule, "Other Subtractions from Arizona Gross Income", on Form 140, page 6, item "R" _____
- E** (Line A + line B) minus (line C + line D). Enter the result -500.

- If the amount on line E is positive, you have a net long-term capital gain from assets acquired **after** December 31, 2011. Enter the amount on Form 140, line 23.
- If the amount on line E is zero or negative, you do not qualify to take the allowable subtraction. Enter "0" on Form 140, line 23.

SMART WORKSHEET FOR: Form 140: Resident Personal Return (Copy 1)

Income Tax Smart Worksheet

- Use Optional Tax Rate Table only (for less than \$50,000 taxable income)
- Use Tax Rate Table X or Y only

a Tax from Optional Tax Rate Table (if taxable income is less than \$50,000)	_____
b Tax from Tax Rate Table X or Y	<u>7,620.</u>
c Smaller of line a and line b	<u>7,620.</u>