Form **8879**

(Rev. January 2021)

Department of the Treasury Internal Revenue Service

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

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

OMB No. 1545-0074

| internal nevertue Service | | | | |
|--|---|---|--|---|
| Submission Identification Number (SID) | | | | |
| Taxpayer's name | Social securi | ty numbe | er | |
| RUTHVIK YEDLA | 745-70 | -0499 | | |
| Spouse's name | Spouse's soo | ial secur | ity numbe | r |
| ANUSHA MANDADI | 723-34 | -9883 | | |
| Part I Tax Return Information — Tax Year Ending December 31, 2022 | (Enter year you a | re auth | norizing | .) |
| Enter whole dollars only on lines 1 through 5. | | | | |
| Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank. | | | | |
| 1 Adjusted gross income | | 1 | | ,898. |
| 2 Total tax | | 2 | | ,894. |
| 3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099 | | 3 | | ,858. |
| 4 Amount you want refunded to you | | 4 | 8 | ,964. |
| 5 Amount you owe | · · · · · · · | 5 | NIK KOTI | ırın) |
| Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or an | | | | |
| to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authoriz Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution according payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to the payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellated business days prior to the payment (settlement) date. I also authorize the financial institutions involved taxes to receive confidential information necessary to answer inquiries and resolve issues related the personal identification number (PIN) below is my signature for the income tax return (original or amend Electronic Funds Withdrawal Consent. | te the U.S. Treasury a bunt indicated in the to institution to debit the erminate the authorization requests must but in the processing of to the payment. I fur | nd its de ax prepare entry to ation. To ereceive f the electher ack | esignated aration so this acco revoke (ed no late ctronic pa nowledge | Financial ftware for ount. This (cancel) a er than 2 ayment of a that the |
| | | | | |
| Taxpayer's PIN: check one box only | 0 | 0 4 | 9 9 | |
| X I authorize GLOBAL TAXES LLC to enter or get | ř En | | igits, but | as my |
| signature on the income tax return (original or amended) I am now authorizing. | do | n't enter | all zeros | |
| I will enter my PIN as my signature on the income tax return (original or amended) if you are entering your own PIN and your return is filed using the Practitioner PIN below. | | | | |
| Your signature ▶ Da | ite ▶ | | | |
| Spouse's PIN: check one box only | | | | |
| | nerate my PIN 4 | 9 8 | 8 3 | as my |
| ERO firm name | _ | ter five d | igits, but | , |
| signature on the income tax return (original or amended) I am now authorizing. I will enter my PIN as my signature on the income tax return (original or amended) if you are entering your own PIN and your return is filed using the Practitioner PIN below. | I am now authorizi | ng. Che | | |
| Spouse's signature ▶ Da | ite ▶ | | | |
| Practitioner PIN Method Returns Only—continue | below | | | |
| Part III Certification and Authentication — Practitioner PIN Method Only | | | | |
| ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. | 2 2 2 4 9 Don't ent | 6 6 er all zer | 1 9 8 os | 9 |
| I certify that the above numeric entry is my PIN, which is my signature for the electronic individual in authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I arrequirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Provided in the Practition PIN method in the Practition PIN method in the Practition PIN method in the PIN method in th | m submitting this retu | urn in ac | cordance | |
| ERO's signature ▶ Da | ite ▶ | | | |
| FRO Must Retain This Form — See Instruction | | | | |

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

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

| 2022 |
|------|
|------|

OMB No. 1545-0074

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

| Filing Status | s 🗌 S | Single X Married filing jointly | Marrie | ed filing separatel | y (MFS |) Head of | household (H | HOH |) | | fying surv | iving |
|----------------------------------|---------|--|---|---------------------------|----------|------------------|---|--------|----------|---------------------------------|------------------------|------------------------|
| Check only one box. | If vo | u checked the MFS box, enter the | name of v | our enquee If vo | u chack | red the HOH or | OSS hove | ntor | the c | | se (QSS) name if th | e aualifyina |
| one box. | | son is a child but not your depender | | our spouse. If yo | u checr | red the HOH of | QOO DOX, E | HILEI | tile Ci | iliu 5 i | iaine ii tii | e qualitying |
| Your first name | | | Last na | me. | | | | | Yo | ur soc | ial securit | v number |
| | | | | | | | Your social security number 745-70-0499 | | | | | |
| RUTHVIK | nnuse's | s first name and middle initial | Last na | | | | | | | Spouse's social security number | | |
| • | pouse c | s instrume and middle initial | | | | | | | 1 ' | | 4-9883 | |
| ANUSHA Home address | (numbe | er and street). If you have a P.O. box, se | MAND e instruction | | | | Apt. no | | _ | | | |
| | | | e iristructio | JIIS. | | | Apt. 110 | • | | | ere if you, | on Campaign or your |
| City town or r | | ce. If you have a foreign address, also c | omnlete si | naces helow | Ste | ate | ZIP code | | | | , , | tly, want \$3 |
| | | ce. Il you have a loreigh address, also c | omplete s | paces below. | T | | 78628 | | | 0 | | Checking a |
| GEORGET(| | | | Foreign province/sta | _ | | | 21 000 | | | w will not or refund. | change |
| Foreign countr | упапе | | | -oreign province/sta | ale/Cour | ity | Foreign posta | ai coc | ie yo | ui tax | You | Spouse |
| . | A.L | - 15 d - 5 0000 -15 d (-) | : - (| | | | a | \ | (1-) | 11 | | |
| Digital | | ny time during 2022, did you: (a) rec ange, gift, or otherwise dispose of | | | | | - | | | | Yes | X No |
| Assets | | eone can claim: You as a d | | | | a dependent | asset): (See | 7 1115 | iructic |)i i5.) | | <u> </u> |
| Standard Deduction | | | • | | | | | | | | | |
| Deduction | | Spouse itemizes on a separate retu | irri or you | were a duar-stat | us allei | 1 | | | | | | |
| Age/Blindnes | s You: | Were born before January 2, | 1958 | Are blind | Spouse | : Was bor | n before Ja | nuar | y 2, 19 | 958 | Is bli | nd |
| Dependent | s (see | instructions): | | (2) Social secu | urity | (3) Relationsh | ip (4) Chec | k the | box if | qualifi | es for (see i | instructions): |
| If more | (1) F | irst name Last name | | number | | to you | Chi | ld tax | credit | : 0 | Credit for oth | ner dependents |
| than four | EHI | KA REDDY YEDLA | | 305-45-6 | 467 | Daughter | | X | <u>(</u> | | | |
| dependents, see instruction | e | | | | | | | |] | | | |
| and check | | | | | | | | |] | | | |
| here |] | | | | | | | | | | | |
| Income | 1a | Total amount from Form(s) W-2, I | box 1 (see | e instructions) | | | | | | 1a | 21 | 6,829. |
| | b | Household employee wages not | reported | on Form(s) W-2 | | | | | | 1b | | |
| Attach Form(s) W-2 here. Also | С | Tip income not reported on line 1a (see instructions) | | | | | | | 1c | | | |
| attach Forms | d | Medicaid waiver payments not reported on Form(s) W-2 (see instructions) | | | | | | 1d | | | | |
| W-2G and | е | Taxable dependent care benefits | Taxable dependent care benefits from Form 2441, line 26 | | | | | | 1e | | | |
| 1099-R if tax was withheld. | f | Employer-provided adoption ben | Employer-provided adoption benefits from Form 8839, line 29 | | | | | | 1f | | | |
| If you did not | g | Wages from Form 8919, line 6 . | | | | | | | | 1g | | |
| get a Form | h | Other earned income (see instruc | tions) . | | | | | | | 1h | | 0. |
| W-2, see instructions. | i | Nontaxable combat pay election | (see instr | (see instructions) | | | | | | | 4 | |
| | z | Add lines 1a through 1h | | , | | | | | | 1z | 21 | 6,829. |
| Attach Sch. B | 2a | Tax-exempt interest | 2a | | b٦ | Taxable interest | t | | | 2b | | |
| if required. | 3a | Qualified dividends | 3a | | | Ordinary divider | | | | 3b | | |
| | 4a | IRA distributions | 4a | | b٦ | Taxable amoun | t | | | 4b | | |
| Standard | 5a | Pensions and annuities | 5a | | b٦ | Taxable amoun | t | | | 5b | | |
| Deduction for— Single or | 6a | Social security benefits | 6a | | b٦ | Taxable amoun | t | | | 6b | | |
| Married filing | С | If you elect to use the lump-sum | election r | method, check he | ere (see | instructions) | | | | | 4 | |
| separately, \$12,950 | 7 | Capital gain or (loss). Attach Scho | edule D if | required. If not r | equirec | l, check here | | | | 7 | | |
| Married filing | 8 | Other income from Schedule 1, li | ne 10 . | | | | | | | 8 | -1 | 2,931. |
| jointly or Qualifying | 9 | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7 | 7, and 8. | This is your total | incom | е | | | | 9 | 20 | 3,898. |
| surviving spouse, \$25,900 | 10 | Adjustments to income from Sch | edule 1, l | ine 26 | | | | | | 10 | | |
| Head of | 11 | Subtract line 10 from line 9. This | is your ac | djusted gross in | come | | | | | 11 | 20 | 3,898. |
| household, \$19,400 | 12 | Standard deduction or itemized | d deducti | ions (from Sched | lule A) | | | | | 12 | 2 | 25,900. |
| If you checked | 13 | Qualified business income deduc | tion from | Form 8995 or Fo | orm 899 | 95-A | | | | 13 | \perp | |
| any box under Standard | 14 | Add lines 12 and 13 | | | | | | | | 14 | 2 | 25,900. |
| Deduction, see instructions. | 15 | Subtract line 14 from line 11. If ze | ero or less | s, enter -0 This | is your | taxable incom | ie | | | 15 | 17 | 77,998. |
|) | , | | | | | | | | | | | |

| Form 1040 (2022 | 2) | | | | | | | | Page 2 |
|--------------------------------------|--------|---|-------------------------|-------------------|-------------------|--|---------------|----------|---|
| Tax and | 16 | Tax (see instructions). Check | if any from Form | (s): 1 881 | 4 2 🗌 4972 | 3 🗌 | | 16 | 30,394. |
| Credits | 17 | Amount from Schedule 2, lin | ne 3 | | | | | 17 | |
| | 18 | Add lines 16 and 17 | | | | | | 18 | 30,394. |
| | 19 | Child tax credit or credit for | other dependent | ts from Sched | ule 8812 | | | 19 | 2,000. |
| | 20 | Amount from Schedule 3, lin | ie 8 | | | | | 20 | 7,500. |
| | 21 | Add lines 19 and 20 | | | | | | 21 | 9,500. |
| | 22 | Subtract line 21 from line 18 | . If zero or less, | enter -0 | | | | 22 | 20,894. |
| | 23 | Other taxes, including self-e | mployment tax, | from Schedule | e 2, line 21 . | | | 23 | 0. |
| | 24 | Add lines 22 and 23. This is | your total tax | | | | | 24 | 20,894. |
| Payments | 25 | Federal income tax withheld | | | | | | | |
| - | а | Form(s) W-2 | | | | 25a 2 | 9,858. | | |
| | b | Form(s) 1099 | | | | 25b | | | |
| | С | Other forms (see instructions | s) | | | 25c | | | |
| | d | Add lines 25a through 25c | | | | | | 25d | 29,858. |
| If you have a | 26 | 2022 estimated tax paymen | ts and amount a | pplied from 20 | 21 return | | | 26 | |
| qualifying child, | 27 | Earned income credit (EIC) | | | | 27 | | | |
| attach Sch. EIC. | 28 | Additional child tax credit from | m Schedule 8812 | | | 28 | | | |
| | 29 | American opportunity credit | from Form 8863 | 8, line 8 | | 29 | | | |
| | 30 | Reserved for future use . | | | | 30 | | | |
| | 31 | Amount from Schedule 3, lin | ne 15 | | | 31 | | | |
| | 32 | Add lines 27, 28, 29, and 31 | . These are your | total other pa | ayments and re | fundable credits | | 32 | |
| | 33 | Add lines 25d, 26, and 32. T | hese are your to | tal payments | | | | 33 | 29,858. |
| Refund | 34 | If line 33 is more than line 24 | l, subtract line 2 | 4 from line 33. | This is the amo | unt you overpaic | l | 34 | 8,964. |
| riciana | 35a | Amount of line 34 you want | | | is attached, ch | eck here | \square | 35a | 8,964. |
| Direct deposit? | b | Routing number 3 2 2 | | | c Type: | Checking | Savings | | |
| See instructions. | d | Account number 3 5 8 | 1 9 3 0 | 7 3 | | | | | |
| | 36 | Amount of line 34 you want | applied to your | 2023 estimate | ed tax | 36 | | | |
| Amount You Owe | 37 | Subtract line 33 from line 24 For details on how to pay, g | | | | | | 37 | |
| | 38 | Estimated tax penalty (see in | nstructions) . | | | 38 | | | |
| Third Party Designee | | you want to allow another | person to disc | cuss this retu | n with the IRS | ? See _ | Complete | below. | X No |
| | De | signee's | | Phone | | Pe | rsonal identi | fication | |
| | naı | me | | no. | | nu | mber (PIN) | | |
| Sign Here | | der penalties of perjury, I declare tief, they are true, correct, and com | | | | | | | |
| пеге | Yo | ur signature | | Date | Your occupation | | Prot | ection P | nt you an Identity IN, enter it here |
| Joint return? | | | | | SOFTWARE | ENGINEER | (see | inst.) | |
| See instructions. Keep a copy for | Sp | ouse's signature. If a joint return, I | ooth must sign. | Date | Spouse's occupa | ation | | | nt your spouse an ection PIN, enter it here |
| your records. | | | | | SOFTWARE | l l | inst.) | | |
| | ———Ph | one no. (315) 796-851 | 3 | Email address | | ENGINEER EDLA@GMAIL.(| · M | | |
| | | eparer's name | Preparer's signat | l | 1/0111/11/11/11 | Date Date | PTIN | | Check if: |
| Paid | | I PRIYA RAM SAGAR GUPTA TALLAM | | | בווסים יים דו מון | | | 2703 | Self-employed |
| Preparer | | m's name GLOBAL TA | | IVIII DUGUL | COLITY TAULA | 11 02/02/202 | | | (678) 965-9522 |
| Use Only | | | Y CT E BRU | NSWICK N | J 08816 | | | ı's EIN | 88-2145487 |
| Co to warming == | | | | 1,0,1,101(1)(| | DEV. 04 (22.22.5.5.5.5.5.5.5.5.5.5.5.5.5.5.5.5.5 | | O LIIV | Form 1040 (2022) |
| GO TO WWW.Irs.g | uvirom | n1040 for instructions and the late | ระเบเบบบลับอก. | | BAA | REV 01/28/23 PRO |) | | Form 1040 (2022) |

SCHEDULE 1 (Form 1040)

Additional Income and Adjustments to Income

OMB No. 1545-0074

2022
Attachment Sequence No. 01

Department of the Treasury Internal Revenue Service

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

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

| ame | (s) shown on Form 1040, 1040-SR, or 1040-NR | Your so | cial s | ecurity number |
|-----|---|---------|--------|----------------|
| UTH | 0-04 | 199 | | |
| Par | t I Additional Income | | | |
| 1 | Taxable refunds, credits, or offsets of state and local income taxes | | 1 | |
| 2a | Alimony received | | 2a | |
| b | Date of original divorce or separation agreement (see instructions): | | | |
| 3 | Business income or (loss). Attach Schedule C | | 3 | |
| 4 | Other gains or (losses). Attach Form 4797 | | 4 | |
| 5 | Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule | | 5 | -12,931. |
| 6 | Farm income or (loss). Attach Schedule F | | 6 | |
| 7 | Unemployment compensation | | 7 | |
| 8 | Other income: | | | |
| а | Net operating loss |) | | |
| b | Gambling | | | |
| С | Cancellation of debt | | | |
| d | Foreign earned income exclusion from Form 2555 |) | | |
| е | Income from Form 8853 | | | |
| f | Income from Form 8889 | | | |
| g | Alaska Permanent Fund dividends 8g | | | |
| h | | | | |
| i | Prizes and awards | | | |
| j | Activity not engaged in for profit income | | | |
| k | | | | |
| I | Income from the rental of personal property if you engaged in the rental | | | |
| | for profit but were not in the business of renting such property | | | |
| m | Olympic and Paralympic medals and USOC prize money (see | | | |
| | instructions) | | | |
| | Section 951(a) inclusion (see instructions) | | | |
| | Section 951A(a) inclusion (see instructions) | | | |
| р | Section 461(I) excess business loss adjustment 8p | | | |

8q

8r

8s

8t

8u

8z

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

u Wages earned while incarcerated

Other income. List type and amount:

Taxable distributions from an ABLE account (see instructions) . . .

Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8

Scholarship and fellowship grants not reported on Form W-2

Total other income. Add lines 8a through 8z

Schedule 1 (Form 1040) 2022

-12,931.

9

10

Schedule 1 (Form 1040) 2022 Page **2**

| Par | t II Adjustments to Income | | |
|----------|--|--------|--|
| 11 | Educator expenses | 11 | |
| 12 | Certain business expenses of reservists, performing artists, and fee-basis gov | | |
| | officials. Attach Form 2106 | 12 | |
| 13 | Health savings account deduction. Attach Form 8889 | 13 | |
| 14 | Moving expenses for members of the Armed Forces. Attach Form 3903 | 14 | |
| 15 | Deductible part of self-employment tax. Attach Schedule SE | 15 | |
| 16 | Self-employed SEP, SIMPLE, and qualified plans | 16 | |
| 17 | Self-employed health insurance deduction | 17 | |
| 18 | Penalty on early withdrawal of savings | 18 | |
| 19a | Alimony paid | 19a | |
| b | Recipient's SSN | | |
| С | Date of original divorce or separation agreement (see instructions): | | |
| 20 | IRA deduction | 20 | |
| 21 | Student loan interest deduction | 21 | |
| 22 | Reserved for future use | 22 | |
| 23 | Archer MSA deduction | 23 | |
| 24 | Other adjustments: | | |
| а | Jury duty pay (see instructions) | | |
| b | Deductible expenses related to income reported on line 8l from the | | |
| | rental of personal property engaged in for profit | | |
| С | Nontaxable amount of the value of Olympic and Paralympic medals | | |
| | and USOC prize money reported on line 8m | | |
| d | Reforestation amortization and expenses | - | |
| е | Repayment of supplemental unemployment benefits under the Trade | | |
| | Act of 1974 | - | |
| f | Contributions to section 501(c)(18)(D) pension plans | | |
| g | Contributions by certain chaplains to section 403(b) plans | - | |
| h | Attorney fees and court costs for actions involving certain unlawful | | |
| | discrimination claims (see instructions) | - | |
| - 1 | 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 | | |
| | tax law violations | - | |
| J | Excess deductions of section 67(e) expenses from Schedule K-1 (Form | | |
| k | 1041) | | |
| - | Other adjustments. List type and amount: | | |
| Z | 04- | | |
| 25 | Total other adjustments. Add lines 24a through 24z | 25 | |
| 25 26 | Add lines 11 through 23 and 25. These are your adjustments to income . Enter here | 23 | |
| 20 | Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a | 26 | |
| | | | |

SCHEDULE 3 (Form 1040)

Department of the Treasury Internal Revenue Service

Additional Credits and Payments

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

2022

Attachment Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR RUTHVIK YEDLA & ANUSHA MANDADI

Your social security number 745-70-0499

| Pai | Nonretundable Credits | | | | |
|-----|---|-------------|---------------|------------------|---------------|
| 1 | Foreign tax credit. Attach Form 1116 if required | | | . 1 | |
| 2 | Credit for child and dependent care expenses from Form 2441 Form 2441 | I, line | 11. Attac | ch . 2 | |
| 3 | Education credits from Form 8863, line 19 | | | . 3 | |
| 4 | Retirement savings contributions credit. Attach Form 8880 | | | . 4 | |
| 5 | Residential energy credits. Attach Form 5695 | | | . 5 | |
| 6 | Other nonrefundable credits: | | | | |
| а | General business credit. Attach Form 3800 | 6a | | | |
| b | Credit for prior year minimum tax. Attach Form 8801 | 6b | | | |
| С | Adoption credit. Attach Form 8839 | 6c | | | |
| d | Credit for the elderly or disabled. Attach Schedule R | 6d | | | |
| е | Alternative motor vehicle credit. Attach Form 8910 | 6e | | | |
| f | Qualified plug-in motor vehicle credit. Attach Form 8936 | 6f | 7 , 50 | 0. | |
| g | Mortgage interest credit. Attach Form 8396 | 6g | | | |
| h | District of Columbia first-time homebuyer credit. Attach Form 8859 | 6h | | | |
| i | Qualified electric vehicle credit. Attach Form 8834 | 6i | | | |
| j | Alternative fuel vehicle refueling property credit. Attach Form 8911 | 6j | | | |
| k | Credit to holders of tax credit bonds. Attach Form 8912 | 6k | | | |
| -1 | Amount on Form 8978, line 14. See instructions | 6I | | | |
| Z | Other nonrefundable credits. List type and amount: | | | | |
| | | 6z | | | |
| 7 | Total other nonrefundable credits. Add lines 6a through 6z $$. $$. | | | . 7 | 7,500. |
| 8 | Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040 | -SR, c | or 1040-NF | | |
| | line 20 | | | . 8 | 7,500. |
| | | | | (continue | ed on page 2) |

Schedule 3 (Form 1040) 2022 Page **2**

| Par | Other Payments and Refundable Credits | | | · |
|----------------------|---|-----|----|---|
| 9 | Net premium tax credit. Attach Form 8962 | | 9 | |
| 10 | Amount paid with request for extension to file (see instructions) . | | 10 | |
| 11 | Excess social security and tier 1 RRTA tax withheld | | 11 | |
| 12 | Credit for federal tax on fuels. Attach Form 4136 | | 12 | |
| 13 | Other payments or refundable credits: | | | |
| а | Form 2439 | 13a | | |
| b | Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021 | 13b | | |
| С | Reserved for future use | 13c | | |
| d | Credit for repayment of amounts included in income from earlier years | 13d | | |
| е | Reserved for future use | 13e | | |
| f | Deferred amount of net 965 tax liability (see instructions) | 13f | | |
| g | Reserved for future use | 13g | | |
| h | Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021 | 13h | | |
| Z | Other payments or refundable credits. List type and amount: | 13z | | |
| 14 | Total other payments or refundable credits. Add lines 13a through | | 14 | |
| 1 4 15 | Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040- | | 14 | |
| 10 | line 31 | | 15 | |

SCHEDULE E (Form 1040)

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

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

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

Attachment Sequence No. 13

Your social security number

OMB No. 1545-0074

| RUTH | VIK YEDLA & ANUSHA MANDADI | | | | | 7 | 745-70 | 0-0499 | |
|----------|---|-----------------|---------------------|----------------|--------------|-------------------------------|---------------|----------------|-------------------|
| Part | Income or Loss From Rental Real Estate an Note: If you are in the business of renting personal proper rental income or loss from Form 4835 on page 2, line 40. | d Ro ty, use | yalties Schedule | c . See | instru | ctions. If you are | an indiv | idual, rep | ort farm |
| ΑΙ | Did you make any payments in 2022 that would require you | | | | | | | | |
| В | f "Yes," did you or will you file required Form(s) 1099? . | | | | | | | . 🗌 Y e | s 🗌 No |
| 1a | Physical address of each property (street, city, state, ZIF | od(| e) | | | | | | |
| Α | H.NO: 4-39/3 CHINTAKUNTA NIZAMABAD T | ELA | NGANA I | N 503 | 3206 | | | | |
| В | | | | | | | | | |
| С | | | | | | | | | |
| 1b | Type of Property (from list below) 2 For each rental real estate proper above, report the number of fair | rental | and | | Fa | ir Rental Days | Person Day | | QJV |
| Α | personal use days. Check the Q | | | Α | | 365 | | 0 | |
| В | if you meet the requirements to f qualified joint venture. See instru | ile as | a | В | | | | | |
| С | qualified joint venture. Gee institu | Otioni | J. | С | | | | | |
| Type | of Property: | | | | | | | | |
| | Single Family Residence 3 Vacation/Short-Term Ren Multi-Family Residence 4 Commercial | tal | 5 Land 6 Roya | - | - | Self-Rental Other (describ | e) | | |
| | | | | | | Properties | | | |
| Incon | ne. | | | Α | | В | . | | С |
| 3 | Rents received | 3 | | | 28. | В | | | |
| 4 | Royalties received | 4 | | | 20. | | | | |
| Exper | ises: | | | | | | | | |
| 5 | Advertising | 5 | | | | | | | |
| 6 | Auto and travel (see instructions) | 6 | | | | | | | |
| 7 | Cleaning and maintenance | 7 | | 2,4 | 81. | | | | |
| 8 | Commissions | 8 | | | | | | | |
| 9 | Insurance | 9 | | | | | | | |
| 10 | Legal and other professional fees | 10 | | | | | | | |
| 11 | Management fees | 11 | | 2,6 | 94. | | | | |
| 12 | Mortgage interest paid to banks, etc. (see instructions) | 12 | | | | | | | |
| 13 | Other interest | 13 | | | | | | | |
| 14 | Repairs | 14 | | | 17. | | | | |
| 15 | Supplies | 15 | | 2,9 | 62. | | | | |
| 16 | Taxes | 16 | | | | | | | |
| 17 | Utilities | 17 | | 2,9 | 05. | | | | |
| 18 | Depreciation expense or depletion | 18 | | | | | | | |
| 19 | Other (list) | 19 | | 10 5 | - 0 | | | | |
| 20 | Total expenses. Add lines 5 through 19 | 20 | | 13,5 | 59. | | | | |
| 21 | Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198 | 21 | | -12 , 9 | 31 | | | | |
| 22 | Deductible rental real estate loss after limitation, if any, | | | ,) | <u></u> | | | | |
| | on Form 8582 (see instructions) | 22 | (| 12,93 | | • |)(| (|) |
| 23a | Total of all amounts reported on line 3 for all rental prope | | | | 23a | | 628. | | |
| b | Total of all amounts reported on line 4 for all royalty prop | | | | 23b | | | | |
| c | Total of all amounts reported on line 12 for all properties | | | | 23c | | | | |
| d | Total of all amounts reported on line 18 for all properties | | | | 23d | 1 2 | 550 | | |
| e 24 | Total of all amounts reported on line 20 for all properties | | | | 23e | 13, | 559. | | |
| 24 25 | Income. Add positive amounts shown on line 21. Do no Losses. Add royalty losses from line 21 and rental real estat | | • | | Inter to | tal lossos hara | 24 25 (| , . | 12 021 \ |
| | | | | | | | | | 12,931.) |
| 26 | Total rental real estate and royalty income or (loss). here. If Parts II, III, IV, and line 40 on page 2 do not Schedule 1 (Form 1040), line 5. Otherwise, include this are | apply | to you, | also er | nter th | is amount on | | | -12 , 931. |

SCHEDULE 8812 (Form 1040)

Credits for Qualifying Children and Other Dependents

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

2022

OMB No. 1545-0074

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

Go to www.irs.gov/Schedule8812 for instructions and the latest information.

Attachment Sequence No. 47

Your social security number

| RUTH' | VIK YEDLA & ANUSHA MANDADI | 745-70 | 0-0499 |
|-------|--|---------------|----------|
| Par | t Child Tax Credit and Credit for Other Dependents | | |
| 1 | Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR | . 1 | 203,898. |
| 2a | Enter income from Puerto Rico that you excluded | | |
| b | Enter the amounts from lines 45 and 50 of your Form 2555 | 0. | |
| c | Enter the amount from line 15 of your Form 4563 | | |
| d | Add lines 2a through 2c | . 20 | 0. |
| 3 | Add lines 1 and 2d | . 3 | 203,898. |
| 4 | Number of qualifying children under age 17 with the required social security number 4 | 1 | |
| 5 | Multiply line 4 by \$2,000 | . 5 | 2,000. |
| 6 | Number of other dependents, including any qualifying children who are not under age | | |
| | 17 or who do not have the required social security number | 0 | |
| | Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. residues a U.S. citizen a U.S. citizen a U.S. citizen, U.S. citizen a U.S. citizen | dent | |
| | alien. Also, do not include anyone you included on line 4. | | |
| 7 | Multiply line 6 by \$500 | | |
| 8 | Add lines 5 and 7 | . 8 | 2,000. |
| 9 | Enter the amount shown below for your filing status. | | |
| | • Married filing jointly—\$400,000 | | |
| | • All other filing statuses—\$200,000 \int | . 9 | 400,000. |
| 10 | Subtract line 9 from line 3. | | |
| | • If zero or less, enter -0 | | |
| | • If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For | | |
| | example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc. | . 10 | |
| 11 | Multiply line 10 by 5% (0.05) | | · · |
| 12 | Is the amount on line 8 more than the amount on line 11? | | 2,000. |
| | No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax cr | edit. | |
| | Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. | | |
| 12 | Yes. Subtract line 11 from line 8. Enter the result. | 10 | |
| 13 | Enter the amount from the Credit Limit Worksheet A | | ==,0510 |
| 14 | Enter the smaller of line 12 or 13. This is your child tax credit and credit for other dependents | . 14 | 2,000. |
| | Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19. | 1 . 1. 21 . 1 | 4 114 |
| | If the amount on line 12 is more than the amount on line 14, you may be able to take the additio | | |
| | on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-N | k throug | n nne 27 |
| | (also complete Schedule 3, line 11) before completing Part II-A. | | |

BAA

Schedule 8812 (Form 1040) 2022

| Part | II-A Additional Child Tax Credit for All Filers | | |
|--------|---|--------|------------|
| Cautio | on: If you file Form 2555, you cannot claim the additional child tax credit. | | |
| 15 | Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line | 27 . | |
| 16a | Subtract line 14 from line 12. If zero, stop here; you cannot take the additional child tax credit. Skip Parts II-A | | |
| | and II-B. Enter -0- on line 27 | 16a | 0. |
| b | Number of qualifying children under 17 with the required social security number: x \$1,500. | | |
| | Enter the result. If zero, stop here; you cannot claim the additional child tax credit. Skip Parts II-A and II-B. | | |
| | Enter -0- on line 27 | 16b | |
| | TIP: The number of children you use for this line is the same as the number of children you used for line 4. | | |
| 17 | Enter the smaller of line 16a or line 16b | 17 | |
| 18a | Earned income (see instructions) | | |
| b | Nontaxable combat pay (see instructions) | | |
| 19 | Is the amount on line 18a more than \$2,500? | | |
| | No. Leave line 19 blank and enter -0- on line 20. | | |
| | Yes. Subtract \$2,500 from the amount on line 18a. Enter the result 19 | | |
| 20 | Multiply the amount on line 19 by 15% (0.15) and enter the result $\dots \dots \dots \dots \dots \dots \dots \dots \dots$ | 20 | |
| | Next. On line 16b, is the amount \$4,500 or more? | | |
| | No. If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the | | |
| | smaller of line 17 or line 20 on line 27. | | |
| | ☐ Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. | | |
| _ | Otherwise, go to line 21. | | |
| Part | II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Resident | s of P | uerto Rico |
| 21 | Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, | | |
| | boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If | | |
| | your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, see | | |
| | instructions | | |
| 22 | Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form | | |
| | 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13 . 22 | | |
| 23 | Add lines 21 and 22 | | |
| 24 | 1040 and | | |
| | 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27, | | |
| | and Schedule 3 (Form 1040), line 11. | | |
| | 1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11. | | |
| 25 | Subtract line 24 from line 23. If zero or less, enter -0 | 25 | |
| 26 | Enter the larger of line 20 or line 25 | 26 | |
| | Next, enter the smaller of line 17 or line 26 on line 27. | | |
| | II-C Additional Child Tax Credit | | |
| 27 | This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28 | 27 | |

Form **8889**

Health Savings Accounts (HSAs)

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

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

OMB No. 1545-0074

2022
Attachment
Sequence No. 52

Internal Revenue Service Go to www
Name(s) shown on Form 1040, 1040-SR, or 1040-NR

RUTHVIK YEDLA

Department of the Treasury

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions. 745-70-0499

| Befo | re you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, i | f requ | ired. |
|------|--|---------|------------------|
| Part | HSA Contributions and Deduction. See the instructions before completing this part. If y and both you and your spouse each have separate HSAs, complete a separate Part I for | | |
| 1 | Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2022. | | |
| | See instructions | □ Se | lf-only 🗵 Family |
| 2 | HSA contributions you made for 2022 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2022. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions | 2 | 0. |
| 3 | If you were under age 55 at the end of 2022 and, on the first day of every month during 2022, you were, or were considered, an eligible individual with the same coverage, enter \$3,650 (\$7,300 for family coverage). All others , see the instructions for the amount to enter | 3 | 7,300. |
| 4 | Enter the amount you and your employer contributed to your Archer MSAs for 2022 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2022, also include any amount contributed to your spouse's Archer MSAs | 4 | 0. |
| 5 | Subtract line 4 from line 3. If zero or less, enter -0 | 5 | 7,300. |
| 6 | Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family | | ., |
| | coverage under an HDHP at any time during 2022, see the instructions for the amount to enter | 6 | 7,300. |
| 7 | If you were age 55 or older at the end of 2022, married, and you or your spouse had family coverage under an HDHP at any time during 2022, enter your additional contribution amount. See instructions. | 7 | · |
| 8 | Add lines 6 and 7 | 8 | 7,300. |
| 9 | Employer contributions made to your HSAs for 2022 | | • |
| 10 | Qualified HSA funding distributions | | |
| 11 | Add lines 9 and 10 | 11 | 3 , 733. |
| 12 | Subtract line 11 from line 8. If zero or less, enter -0 | 12 | 3,567. |
| 13 | HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13 | 13 | 0. |
| | Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions. | | |
| Part | HSA Distributions. If you are filing jointly and both you and your spouse each have separate Part II for each spouse. | arate I | HSAs, complete |
| 14a | Total distributions you received in 2022 from all HSAs (see instructions) | 14a | |
| b | Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions | 14b | |
| С | Subtract line 14b from line 14a | 14c | |
| 15 | Qualified medical expenses paid using HSA distributions (see instructions) | 15 | |
| 16 | Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0 Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f | 16 | |
| 17a | If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here | | |
| b | Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c | 17b | |
| Part | Income and Additional Tax for Failure To Maintain HDHP Coverage. See the instruct completing this part. If you are filing jointly and both you and your spouse each have sep complete a separate Part III for each spouse. | | |
| 18 | Last-month rule | 18 | |
| 19 | Qualified HSA funding distribution | 19 | |
| 20 | Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f . | 20 | |
| 21 | Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form | | <u> </u> |
| | 1040). Part II. line 17d | 21 | |

BAA

Form **8936** (Rev. January 2023)

Department of the Treasury

Tentative Credit

Use a separate column for each vehicle. If you need more columns,

use additional Forms 8936 and include the totals on lines 12 and 19.

Enter date vehicle was placed in service (MM/DD/YYYY)

If the vehicle is a two-wheeled vehicle, enter the cost of

Year, make, and model of vehicle

Vehicle identification number (see instructions)

Internal Revenue Service

1

2

3

Qualified Plug-in Electric Drive Motor Vehicle Credit

(Including Qualified Two-Wheeled Plug-in Electric Vehicles and New Clean Vehicles)

Attach to your tax return.

Go to www.irs.gov/Form8936 for instructions and the latest information.

OMB No. 1545-2137

Attachment Sequence No. **69**

(b) Vehicle 2

Name(s) shown on return

RUTHVIK YEDLA & ANUSHA MANDADI

745-70-0499

Note: This credit is for qualified plug-in electric drive motor vehicles placed in service before 2023, qualified two-wheeled plug-in electric vehicles acquired before but placed in service in 2022, and new clean vehicles placed in service after 2022. See separate instructions for vehicle definitions and other requirements.

1

2

3

(a) Vehicle

WVGKMPE27NP071884

08/15/2022

VOLKSWAGEN

ID4

the vehicle. If the vehicle has at least four wheels, see instructions 4a 7,500. Phase-out percentage (see instructions) 4b 100.00 % % 7,500. **c** Tentative credit. Multiply line 4a by line 4b 4c Next: If you did NOT use your vehicle for business or investment purposes and did not have a credit from a partnership or S corporation, skip Part II and go to Part III. All others, go to Part II. Part II Credit for Business/Investment Use Part of Vehicle 5 Business/investment use percentage (see instructions) % Multiply line 4c by line 5. If the vehicle has at least four wheels, leave lines 7 through 10 blank and go to line 11 6 7 7 Section 179 expense deduction (see instructions) Subtract line 7 from line 6 8 8 9 Multiply line 8 by 10% (0.10) 9 10 Maximum credit per vehicle 10 2,500 2,500 11 For vehicles with four or more wheels, enter the amount from line 6. If the vehicle is a two-wheeled vehicle, enter the smaller of line 9 or line 10 12 Add columns (a) and (b) on line 11 12 13 Qualified plug-in electric drive motor vehicle credit from partnerships and S corporations 13 (see instructions) Business/investment use part of credit. Add lines 12 and 13. Partnerships and 14 S corporations, stop here and report this amount on Schedule K. All others, report this amount on Form 3800, Part III, line 1y Note: Complete Part III to figure any credit for the personal use part of the vehicle.

Form 8936 (Rev. 1-2023) Page **2**

| | | | | | . age — |
|--------|---|----------|---------------|-------|--|
| Part | Credit for Personal Use Part of Vehicle | | | | |
| | _ | | (a) Vehicle 1 | | (b) Vehicle 2 |
| 15 | | 15 16 | 7,5 | 00. | E |
| 17 | Maximum credit per vehicle. If you skipped Part II, enter \$2,500. If you completed Part II, subtract line 11 from line 10 | 17 | | | |
| 18 | For vehicles with four or more wheels placed in service before 2023, enter the amount from line 15. If the vehicle is a two-wheeled vehicle, enter the smaller of line 16 or line 17. For vehicles placed in service after 2022, see instructions | 18 | 7,5 | 00. | |
| 19 | Add columns (a) and (b) on line 18 | | | 19 | 7,500. |
| 20 | Enter the amount from Form 1040, 1040-SR, or 1040-NR, li | ine ' | 18 | 20 | 30,394. |
| 21 | Personal credits from Form 1040, 1040-SR, or 1040-NR (se | e in | structions) | 21 | |
| 22 | Subtract line 21 from line 20. If zero or less, enter -0- and the personal use part of the credit | | | 22 | 30,394. |
| 23 | Personal use part of credit. Enter the smaller of line Schedule 3 (Form 1040), line 6f. If line 22 is smaller than line | | | 23 | 7,500. |
| \neg | | | | REV 0 | 1/28/23 PRO Form 8936 (Rev. 1-2023) |

DO NOT FILE

(Rev. November 2022)

Department of the Treasury Internal Revenue Service

Taxpayer name(s) shown on return

Paid Preparer's Due Diligence Checklist

Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC),
Child Tax Credit (CTC) (including the Additional Child Tax Credit (ACTC) and
Credit for Other Dependents (ODC)), and Head of Household (HOH) Filing Status

To be completed by preparer and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS. Go to www.irs.gov/Form8867 for instructions and the latest information.

OMB No. 1545-0074 For tax year 20 Attachment Sequence No. 70

Taxpayer identification number

| RUTE | HVIK YEDLA & ANUSHA MANDADI | 745-70-049 | 9 | | | | | | | | |
|---|---|--|------------|-----|-----|--|--|--|--|--|--|
| Preparer's name | | Preparer tax identifica | ation numb | oer | | | | | | | |
| | M PRIYA RAM SAGAR GUPTA TALLAM | P02082703 | | | | | | | | | |
| Part I Due Diligence Requirements | | | | | | | | | | | |
| Please check the appropriate box for the credit(s) and/or HOH filing status claimed on the return and complete the related Parts I–V for the benefit(s) claimed (check all that apply). | | | | | | | | | | | |
| 1 | Did you complete the return based on information for the applicable tax year provided or reasonably obtained by you? (See instructions if relying on prior year earned income.) | | Yes | No | N/A | | | | | | |
| 2 | If credits are claimed on the return, did you complete the applicable EIC and/or C worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Scheol 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instruction worksheet(s) that provides the same information, and all related forms and schedules claimed? | lule 8812 (Form s, or your own | X | | | | | | | | |
| 3 | Did you satisfy the knowledge requirement? To meet the knowledge requirement, you rethe following. Interview the taxpayer, ask questions, and contemporaneously document the taxpayer determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status. | | | | | | | | | | |
| | • Review information to determine that the taxpayer is eligible to claim the credit(s) and status and to figure the amount(s) of any credit(s) | | × | | | | | | | | |
| 4 | Did any information provided by the taxpayer or a third party for use in preparing information reasonably known to you, appear to be incorrect, incomplete, or inconsist answer questions 4a and 4b. If "No," go to question 5.) | stent? (If "Yes," | | X | | | | | | | |
| а | Did you make reasonable inquiries to determine the correct, complete, and consistent in | formation? . | | | | | | | | | |
| b | Did you contemporaneously document your inquiries? (Documentation should include you asked, whom you asked, when you asked, the information that was provided, and information had on your preparation of the return.) | the impact the | | | | | | | | | |
| 5 | Did you satisfy the record retention requirement? To meet the record retention require keep a copy of your documentation referenced in question 4b, a copy of this Form 886 applicable worksheet(s), a record of how, when, and from whom the information used t 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) taxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing state the amount(s) of the credit(s) | 7, a copy of any o prepare Form provided by the latus or to figure | × | | | | | | | | |
| | List those documents provided by the taxpayer, if any, that you relied on: | | | | | | | | | | |
| 6 | Did you ask the taxpayer whether he/she could provide documentation to substantiate credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return is selected for audit? | return if his/her | × | | | | | | | | |
| 7 a | Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous (If credits were disallowed or reduced, go to question 7a; if not, go to question 8.) Did you complete the required recertification Form 8862? | | X | | | | | | | | |
| 8 | If the taxpayer is reporting self-employment income, did you ask questions to prepare correct Schedule C (Form 1040)? | a complete and | | | | | | | | | |

| orm 88 | 367 (Rev. 11-2022) | | | Page 2 | | | |
|--------|--|----------------------|-------------------|--------------------|--|--|--|
| Part | Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go | to Part | III.) | | | | |
| 9a | Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.) | Yes | No | N/A | | | |
| b | Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer has supported the child the entire year? | | | | | | |
| С | Did you explain to the taxpayer the rules about claiming the EIC when a child is the qualifying child of more than one person (tiebreaker rules)? | | | | | | |
| Part | Due Diligence Questions for Returns Claiming CTC/ACTC/ODC (If the return does not or ODC, go to Part IV.) | claim C | CTC, A | CTC, | | | |
| 10 | Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is a citizen, national, or resident of the United States? | Yes | No | N/A | | | |
| 11 | Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child? | X | | | | | |
| 12 | Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return? | | | | | | |
| Part | statement to the return? | X \ | Dort \ | /\ /\ | | | |
| 13 | Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qua | | Yes | No | | | |
| | tuition and related expenses for the claimed AOTC? | | | | | | |
| Part | The state of the s | | | | | | |
| 14 | Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax and provided more than half of the cost of keeping up a home for the year for a qualifying person? | k year | Yes | No | | | |
| Part | | | | | | | |
| | You will have complied with all due diligence requirements for claiming the applicable credit(s) and on the return of the taxpayer identified above if you: | or HO | H filing | status | | | |
| | A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's responses on the return or in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s); | | | | | | |
| | B. Complete this Form 8867 truthfully and accurately and complete the actions described in this checkled credit(s) claimed and HOH filing status, if claimed; | list for a | iny app | licable | | | |
| | C. Submit Form 8867 in the manner required; and | | | | | | |
| | D. Keep all five of the following records for 3 years from the latest of the dates specified in the Form 88 Document Retention. | 67 instr | uctions | under | | | |
| | 1. A copy of this Form 8867. | | | | | | |
| | 2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed. | | | | | | |
| | Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s). | 's eligib | oility for | the | | | |
| | A record of how, when, and from whom the information used to prepare this form and the applica obtained. | ble wor | ksheet(| s) was | | | |
| | A record of any additional information you relied upon, including questions you asked and the tax determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount | payer's ınt(s) of | respon the cre | ses, to dit(s). | | | |
| | If you have not complied with all due diligence requirements, you may have to pay a penalty for each related to a claim of an applicable credit or HOH filing status (see instructions for more information | h failur). | e to co | mply | | | |
| 15 | Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct complete? | t, and | Yes | No | | | |
| | 1 | Form 88 0 | | 11-2022 | | | |