#### **IRS e-file Signature Authorization**

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service

ERO must obtain and retain completed Form 8879. ▶ Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID)

| Taxpayer's name  | Social security number            |
|--|-----------------------------------|
| MUHAMMAD KHAN  | 767-50-6693                       |
| Spouse's name  | Spouse's social security number   |
| FATIMA KHAN  | 488-83-0784                       |
| Part I Tax Return Information – Tax Year Ending December 31, 2023 (E         | (Enter year you are authorizing.) |
| 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. |                                   |
| <b>1</b> Adjusted gross income   | <b>1</b> 123,853.                 |
| <b>2</b> Total tax   | <b>2</b> 7,323.                   |
| 3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099              | <b>3</b> 17,097.                  |
| 4 Amount you want refunded to you  | · · · · · · <b>4</b> 11,055.      |
| <b>5</b> Amount you owe  | 5                                 |
| Part II Taxpayer Declaration and Signature Authorization (Be sure you get a  | and keep a copy of your return)   |

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

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

| X | I authorize | GLOBAL | TAXES | LLC           | to enter or generate my PIN |  |
|---|-------------|--------|-------|---------------|-----------------------------|--|
|   |             |        |       | ERO firm name |                             |  |

| 0          | 6     | 6 | 9 | 3 |  |
|------------|-------|---|---|---|--|
| Ent<br>don | as my |   |   |   |  |

7

Enter five digits, but don't enter all zeros

4

as mv

8

3 0

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) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature

#### Spouse's PIN: check one box only

X I authorize GLOBAL TAXES LLC ERO firm name

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) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

| Spouse's signature 🕨                                    | Date 🕨  |  |  |  |
|---|---|--|--|--|
| Practitioner PIN Method Returns Only—continue below     |   |  |  |  |
| Part III Certification and Authentication – Pr          | ctitioner PIN Method Only   |  |  |  |
| ERO's EFIN/PIN. Enter your six-digit EFIN followed by y | ur five-digit self-selected PIN. 2 2 2 4 9 6 6 1 9 8 9<br>Don't enter all zeros |  |  |  |

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

| ERO's sig | nature 🕨 |         |   | Date 🕨 |             |         |
|-----------|----------|---------|---|--------|-------------|---------|
|           |          | Don't S | ERO Must Retain This<br>Submit This Form to the | <br>   |             |         |
|           |          |         |   | <br>   | <br>0070 /= | 04.0004 |

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

to enter or generate my PIN

| <b>1040</b>                                      |                          | artment of the Treasury—Internal Revenue Servi<br>S. Individual Income Tax |            | urn            | 202                  | 3            | OMB No. 1545-    | 0074   | IRS Use Only  | —Do not w           | rite or sta | aple in this space.                   |
|--|--------------------------|--|------------|----------------|----------------------|--------------|------------------|--------|---------------|---------------------|-------------|---------------------------------------|
| For the year Jan                                 | . 1–Dec                  | . 31, 2023, or other tax year beginning                                    |            |                | , 2023, endi         | ng           |                  |        | , 20          | See se              | oarate      | instructions.                         |
| Your first name                                  | and mi                   | ddle initial   | Last nar   | me             |                      |              |                  |        |               | Your so             | cial sec    | curity number                         |
| MUHAMMAD   | )                        |  | KHAN       |                |                      |              |                  |        |               | 767                 | 50          | 6693                                  |
|  |                          | first name and middle initial  | Last nar   |                |                      |              |                  |        |               | Spouse'             |             | I security number                     |
| FATIMA   |                          |  | KHAN       |                |                      |              |                  |        |               | 488                 | 83          | 0784                                  |
|  | (numbe                   | r and street). If you have a P.O. box, see                                 | instructio | ons.           |                      |              |                  | Α      | pt. no.       |                     |             | ection Campaign                       |
| 15606 SW   | I SNO                    | OWY OWL LANE   |            |                |                      |              |                  |        |               |                     |             | ou, or your                           |
| City, town, or p                                 | ost offic                | ce. If you have a foreign address, also co                                 | mplete sp  | paces bel      | ow.                  | Sta          | te               | ZIP co | ode           |                     |             | jointly, want \$3<br>nd. Checking a   |
| BEAVERTC   | N                        |  |            |                |                      | OR           | ł                | 970    | 07            |                     |             | not change                            |
| Foreign country                                  | name                     |  | F          | oreign pr      | ovince/state/c       | ount         | iy 🛛             | Foreig | n postal code | your tax            | or refu     | ind.                                  |
|  |                          |  |            |                |                      |              |                  |        |               |                     | ∐ Yo        | ou Spouse                             |
| Filing Status                                    | ;                        | Single   |            |                |                      |              | Head of ho       | useh   | old (HOH)     |                     |             |                                       |
| Check only                                       | ×                        | Married filing jointly (even if only o                                     | ne had ir  | ncome)         |                      |              | _                |        |               |                     |             |                                       |
| one box.   |                          | Married filing separately (MFS)  |            |                |                      |              | , ,              |        | ing spouse    | ` '                 |             |                                       |
|  |                          | rou checked the MFS box, enter the   |            |                | oouse. If you        | che          | ecked the HOH    | or QS  | SS box, ente  | er the chi          | ld's na     | me if the                             |
|  | qu                       | alifying person is a child but not you                                     | ir depen   | dent:          |                      |              |                  |        |               |                     |             |                                       |
| Digital  |                          | ny time during 2023, did you: (a) rece                                     |            |                |                      |              |                  |        |               |                     |             |                                       |
| Assets   | exch                     | ange, or otherwise dispose of a dig  | ital asset |                |                      |              |                  | )? (Se | e instruction | าร.)                |             | es 🛛 No                               |
| Standard   | Som                      | eone can claim: 🗌 You as a de  | pendent    |                | Your spouse          | e as         | a dependent      |        |               |                     |             |                                       |
| Deduction  | <u> </u>                 | Spouse itemizes on a separate retur  | n or you   | were a         | dual-status a        | alien        |                  |        |               |                     |             |                                       |
| Age/Blindness                                    | You:                     | Were born before January 2, 1  | 959        | Are bli        | ind Spo              | use          | : 🗌 Was borr     | n befo | ore January 2 | 2, 1959             | <u> </u>    | s blind                               |
| Dependents                                       | s (see                   | instructions):   |            | (2) S          | ocial security       |              | (3) Relationshi  | o (4   | •             | · · ·               |             | (see instructions):                   |
| If more  | (1) First name Last name |  |            |                | number               |              | to you           |        | Child tax ci  | redit               | Credit fo   | or other dependents                   |
| than four<br>dependents,                         |                          | IA NAYYER KHAN   |            |                | -51-0881             |              | Daughter         |        |               |                     |             | ×                                     |
| see instructions                                 | s ——                     | ALIZAH NAYYER KHAN   |            |                | -85-0827             |              | Daughter         |        |               |                     |             | <u>×</u>                              |
| and check<br>here                                |                          | RHAM MUHAMMAD KHAN<br>AAHIM MUHAMMAD KHAN                                  |            |                | -65-3317<br>-04-6790 |              | Son<br>Son       |        | X             |                     |             |                                       |
|  | таа.<br>1а               | Total amount from Form(s) W-2, b   | ov 1 (see  |                |                      |              |                  |        |               | . 1a                |             | 180,168.                              |
| Income   | b                        |  |            |                | ,                    |              |                  |        |               | . 1b                | -           |                                       |
| Attach Form(s)<br>W-2 here. Also                 | c                        |  |            |                |                      |              |                  | . 1c   | -             |                     |             |                                       |
| attach Forms                                     | d                        |  |            |                |                      |              |                  | . 1d   | -             |                     |             |                                       |
| W-2G and<br>1099-R if tax                        | е                        |  |            |                |                      |              |                  | . 1e   |               |                     |             |                                       |
| was withheld.                                    | f                        | Employer-provided adoption benefits from Form 8839, line 29                |            |                |                      |              |                  | . 1f   |               |                     |             |                                       |
| lf you did not                                   | g                        |  |            |                |                      |              |                  | . 1g   |               |                     |             |                                       |
| get a Form<br>W-2, see                           | h                        | Other earned income (see instruct  |            |                |                      |              | <sub>.</sub> .   |        |               | . 1h                |             | 0.                                    |
| instructions.                                    | i                        | Nontaxable combat pay election (see instructions)                          |            |                |                      |              |                  |        |               |                     |             |                                       |
|  | z                        | Add lines 1a through 1h  |            |                |                      |              |                  |        |               | . 1z                |             | 180,168.                              |
| Attach Sch. B                                    | 2a                       | Tax-exempt interest  | 2a         |                |                      | b Ta         | axable interest  |        |               | . 2b                |             |                                       |
| if required.                                     | 3a                       | Qualified dividends  | 3a         |                |                      | <b>b</b> 0   | ordinary dividen | ds .   |               | . 3b                |             |                                       |
| Standard   | 4a                       | IRA distributions  | 4a         |                |                      |              | axable amount    |        |               | . 4b                |             |                                       |
| Deduction for –                                  | 5a                       |  | 5a         |                |                      |              | axable amount    |        |               | . 5b                | -           | 5,494.                                |
| <ul> <li>Single or<br/>Married filing</li> </ul> | 6a                       | , _  | 6a         |                |                      |              | axable amount    | • •    |               | . 6b                | _           |                                       |
| separately,                                      | _c                       | If you elect to use the lump-sum e   |            | -              |                      |              | ,                | • •    | L             | $\exists \mid$      |             | 2 . 0 . 0                             |
| \$13,850<br>Married filing                       | 7                        | Capital gain or (loss). Attach Sche  |            |                |                      |              |                  | • •    | L             |                     | _           | -3,000.                               |
| jointly or<br>Qualifying                         | 8                        | Additional income from Schedule  |            |                |                      |              |                  |        |               | . 8                 |             | -58,809.                              |
| surviving spouse,<br>\$27,700                    | 9<br>10                  | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7  |            |                |                      |              |                  | • •    |               | . 9                 |             | 123,853.                              |
| <ul> <li>Head of</li> </ul>                      | 10                       | Adjustments to income from Sche<br>Subtract line 10 from line 9. This is   |            |                |                      |              |                  | • •    |               | . <u>10</u><br>. 11 |             | 100 050                               |
| household, [<br>\$20,800                         | 11<br>12                 | Standard deduction or itemized   |            |                |                      |              |                  | • •    |               | · 11<br>· 12        | -           | <u>123,853.</u><br>27,700.            |
| • If you checked any box under                   | 13                       | Qualified business income deduct   |            |                |                      |              | <br>5-А          | • •    |               | · 12<br>· 13        | -           | <u> </u>                              |
| Standard   | 13<br>14                 | Add lines 12 and 13  |            | 1 0111 08      |                      | 599          | о <b>л</b>       | • •    | • • •         | . <u>13</u><br>. 14 |             | 27,700.                               |
| Deduction, see instructions.                     | 15                       | Subtract line 14 from line 11. If zer                                      |            | <br>s. enter - | 0 This is vo         | our <b>t</b> | axable income    | <br>a  | •••           | . 15                |             | 96,153.                               |
|  |                          |  | 5 51 1033  | .,             | 5 y                  |              |                  |        |               | . 15                |             | · · · · · · · · · · · · · · · · · · · |

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

Form **1040** (2023)

| Form 1040 (2023      | 3)      |   |                       |                     |                  |                     |                |         | Page <b>2</b>                           |
|----------------------|---------|---|-----------------------|---------------------|------------------|---------------------|----------------|---------|---|
| Tax and              | 16      | Tax (see instructions). Check                 | if any from Form      | (s): <b>1</b> 🗌 881 | 4 <b>2</b> 4972  | 3 🗌                 |                | 16      | 11,774.                                 |
| Credits              | 17      | Amount from Schedule 2, lin                   | e3                    |                     |                  |                     | [              | 17      |   |
|                      | 18      | Add lines 16 and 17                           |                       |                     |                  |                     | [              | 18      | 11,774.                                 |
|                      | 19      | Child tax credit or credit for                | other dependen        | ts from Sched       | ule 8812         |                     | [              | 19      | 5,000.                                  |
|                      | 20      | Amount from Schedule 3, lin                   | e8                    |                     |                  |                     | [              | 20      |   |
|                      | 21      | Add lines 19 and 20                           |                       |                     |                  |                     | [              | 21      | 5,000.                                  |
|                      | 22      | Subtract line 21 from line 18                 | . If zero or less,    | enter -0            |                  |                     |                | 22      | 6,774.                                  |
|                      | 23      | Other taxes, including self-e                 | mployment tax,        | from Schedule       | e 2, line 21 .   |                     | [              | 23      | 549.                                    |
|                      | 24      | Add lines 22 and 23. This is                  | your <b>total tax</b> |                     |                  |                     | [              | 24      | 7,323.                                  |
| Payments             | 25      | Federal income tax withheld                   |                       |                     |                  |                     |                |         |   |
|                      | а       | Form(s) W-2                                   |                       |                     |                  | <b>25a</b> 15       | ,998.          |         |   |
|                      | b       | Form(s) 1099                                  |                       |                     |                  | <b>25b</b> 1        | ,099.          |         |   |
|                      | с       | Other forms (see instructions                 | 6)                    |                     |                  | 25c                 |                |         |   |
|                      | d       | Add lines 25a through 25c                     |                       |                     |                  |                     |                | 25d     | 17,097.                                 |
| If you have a        | 26      | 2023 estimated tax payment                    | s and amount a        | pplied from 20      | 22 return .      |                     | [              | 26      |   |
| qualifying child,    | 27      | Earned income credit (EIC)                    |                       | ••                  |                  | 27                  |                |         |   |
| attach Sch. EIC.     | 28      | Additional child tax credit from              |                       |                     |                  | 28                  |                |         |   |
|                      | 29      | American opportunity credit                   | from Form 8863        | 8. line 8           |                  | 29                  |                |         |   |
|                      | 30      | Reserved for future use .                     |                       |                     |                  | 30                  |                |         |   |
|                      | 31      | Amount from Schedule 3, lin                   |                       |                     |                  |                     | ,281.          |         |   |
|                      | 32      | Add lines 27, 28, 29, and 31                  |                       |                     |                  |                     | ,              | 32      | 1,281.                                  |
|                      | 33      | Add lines 25d, 26, and 32. T                  |                       |                     | -                |                     |                | 33      | 18,378.                                 |
| Refund               | 34      | If line 33 is more than line 24               |                       |                     |                  |                     |                | 34      | 11,055.                                 |
| neruna               | 35a     | Amount of line 34 you want                    | -                     |                     |                  |                     | . n f          | 35a     | 11,055.                                 |
| Direct deposit?      | b       | Routing number 3 2 3                          |                       |                     |                  |                     | Savings        |         |   |
| See instructions.    | d       | Account number 4 8 5                          |                       |                     |                  |                     | g-             |         |   |
|                      | 36      | Amount of line 34 you want a                  |                       |                     |                  | 36                  |                |         |   |
| Amount               | 37      | Subtract line 33 from line 24                 |                       |                     |                  |                     |                |         |   |
| You Owe              | 57      | For details on how to pay, g                  |                       |                     |                  |                     |                | 37      |   |
|                      | 38      | Estimated tax penalty (see ir                 |                       |                     |                  | 38                  |                |         |   |
| Third Party          |         | you want to allow another                     | ,                     |                     |                  |                     |                |         |   |
| Designee             |         |   |                       |                     |                  |                     | omplete be     | low.    | × No                                    |
| _ • • • • 9.100      | De      | signee's                                      |                       | Phone               |                  | Pers                | onal identific | ation   |   |
|                      | nar     | mē  |                       | no.                 |                  | num                 | oer (PIN)      |         |   |
| Sign                 |         | der penalties of perjury, I declare the       |                       |                     |                  |                     |                |         |   |
| Here                 |         | ief, they are true, correct, and com          | piete. Declaration of |                     | . , ,            | ased on all mormali |                | •       | , ,                                     |
|                      | Yo      | ur signature                                  |                       | Date                | Your occupation  |                     |                |         | nt you an Identity<br>IN, enter it here |
| Joint return?        |         |   |                       |                     | SENTOR DAT       | LA ENGINEEF         |                |         | in, enter it here                       |
| See instructions.    | Sp      | ouse's signature. If a joint return, <b>i</b> | ooth must sian.       | Date                | Spouse's occupat |                     |                | RS ser  | nt your spouse an                       |
| Keep a copy for      | -1-     | ,,,,,   | g                     |                     |                  |                     | Identit        | y Prote | ection PIN, enter it here               |
| your records.        |         |   |                       |                     | HOME MAKE        | ર                   | (see in        | st.)    |   |
|                      | Ph      | one no. (503)516-402                          | 2                     | Email address       | MREHANKAN        | GMAIL.COM           |                |         | 1                                       |
| Paid                 | Pre     | eparer's name                                 | Preparer's signat     | ure                 |                  | Date                | PTIN           | ٦       | Check if:                               |
|                      | VENK    | ATA SAI PAVAN KUMAR DUDIPALLI                 | VENKATA SAI           | PAVAN KUM           | AR DUDIPALLI     |                     | P02470         | 833     | Self-employed                           |
| Preparer<br>Use Only | Fin     | m's name GLOBAL TAX                           | XES LLC               |                     |                  |                     | Phone          | no. (   | (678)965-9522                           |
|                      | Fin     | m's address 245 ROONE                         | Y CT E BRU            | NSWICK N            | J 08816          |                     | Firm's         | EIN     | 88-2145487                              |
| Go to www.irs.go     | ov/Forn | n1040 for instructions and the late           | st information.       |                     | BAA              | REV 02/05/24 PRO    |                |         | Form <b>1040</b> (2023)                 |

REV 02/05/24 PRO

| 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

2023 Attachment Sequence No. 01

| Name(s) shown on Form 1040, 1040-SR, or 1040-NR | Your social security number |  |  |  |
|---|-----------------------------|--|--|--|
| MUHAMMAD & FATIMA KHAN                          | 767-50-6693                 |  |  |  |
|   |                             |  |  |  |

| Par    | 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  | -58,809.             |
| 4      | Other gains or (losses). Attach Form 4797   |                  | 4  |                      |
| 5      | Rental real estate, royalties, partnerships, S corporations, trusts, etc. Att   | ach Schedule E . | 5  |                      |
| 6      | Farm income or (loss). Attach Schedule F  |                  | 6  |                      |
| 7      | Unemployment compensation   |                  | 7  |                      |
| 8      | Other income:   |                  |    |                      |
| а      | Net operating loss  | 8a (             | )  |                      |
| b      | Gambling  | 8b               |    |                      |
| С      | Cancellation of debt  | 8c               | _  |                      |
| d      | Foreign earned income exclusion from Form 2555  | 8d (             | )  |                      |
| е      | Income from Form 8853   | 8e               |    |                      |
| f      | Income from Form 8889   | 8f               |    |                      |
| g      | Alaska Permanent Fund dividends   | 8g               |    |                      |
| h      | Jury duty pay   | 8h               |    |                      |
| i      | Prizes and awards   | 8i               | _  |                      |
| j      | Activity not engaged in for profit income   | 8j               | _  |                      |
| k      | Stock options   | 8k               | _  |                      |
| I      | Income from the rental of personal property if you engaged in the rental  |                  |    |                      |
|        | for profit but were not in the business of renting such property  | 81               | _  |                      |
| m      | Olympic and Paralympic medals and USOC prize money (see   |                  |    |                      |
|        |   | 8m               | _  |                      |
| n      | Section 951(a) inclusion (see instructions)   | 8n               | _  |                      |
| 0      | Section 951A(a) inclusion (see instructions)  | 80               | _  |                      |
| р      | Section 461(I) excess business loss adjustment  | 8p               | _  |                      |
| q      | Taxable distributions from an ABLE account (see instructions)   | 8q<br>8r         | -  |                      |
| r      | Scholarship and fellowship grants not reported on Form W-2 Nontaxable amount of Medicaid waiver payments included on Form | or               | -  |                      |
| S      | 1040, line 1a or 1d   | 8s (             |    |                      |
| t      | Pension or annuity from a nonqualifed deferred compensation plan or   |                  | /  |                      |
| Ľ      | a nongovernmental section 457 plan  | 8t               |    |                      |
| u      | Wages earned while incarcerated   | 8u               | -  |                      |
| z      | Other income. List type and amount:   |                  | -  |                      |
| 2      |   | 8z               |    |                      |
| 9      | Total other income. Add lines 8a through 8z   |                  | 9  |                      |
| 10     | Combine lines 1 through 7 and 9. This is your <b>additional income</b> . Ente   |                  | -  |                      |
| 10     | 1040, 1040-SR, or 1040-NR, line 8   |                  | 10 | -58,809.             |
| For Pa | perwork Reduction Act Notice, see your tax return instructions.   |                  |    | e 1 (Form 1040) 2023 |

| Par    | t II Adjustments to Income  |              |               |               |
|--------|---|--------------|---------------|---------------|
| 11     | Educator expenses   |              | 11            |               |
| 12     | Certain business expenses of reservists, performing artists, and fee-basi   |              |               |               |
|        | 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    |   |              | 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:  |              | 20            |               |
| 2<br>a | Jury duty pay (see instructions)  |              |               |               |
| b      | Deductible expenses related to income reported on line 8I from the          |              |               |               |
| D      | rental of personal property engaged in for profit                           |              |               |               |
| -      | Nontaxable amount of the value of Olympic and Paralympic medals             |              | -             |               |
| С      | and USOC prize money reported on line 8m                                    |              |               |               |
| h      |   |              | -             |               |
| d      |   |              | -             |               |
| 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 24g              |              | -             |               |
| h      | Attorney fees and court costs for actions involving certain unlawful        |              |               |               |
|        | discrimination claims (see instructions)                                    |              | -             |               |
| 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  |              | -             |               |
| j      | Housing deduction from Form 2555  |              |               |               |
| k      | Excess deductions of section 67(e) expenses from Schedule K-1 (Form         |              |               |               |
|        | 1041)   |              |               |               |
| 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 |              |               |               |
|        | Form 1040, 1040-SR, or 1040-NR, line 10                                     |              | 26            |               |
|        | BAA REV   | 02/05/24 PRO | Schedule 1 (F | orm 1040) 202 |

| SCHE  | DULE  | 2 |
|-------|-------|---|
| (Form | 1040) |   |

Department of the Treasury

## **Additional Taxes**

OMB No. 1545-0074

20

Attachment

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

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

|      | Revenue Service            | Go to www.irs.gov/Form1040 for instructions and the late | st information. |         | Attachment<br>Sequence No. 02 |   |
|------|----------------------------|--|-----------------|---------|-------------------------------|---|
| Name | e(s) shown on Fo           | rm 1040, 1040-SR, or 1040-NR                             |                 | Your so | cial security number          |   |
| -    | AMMAD & FAT                | IMA KHAN   |                 | 767-50  | 0-6693                        | _ |
| Pa   | rt I Tax                   |  |                 |         |                               | _ |
| 1    | Alternative r              | ninimum tax. Attach Form 6251                            |                 |         | 1                             | _ |
| 2    | Excess adva                | ance premium tax credit repayment. Attach Form 8962      |                 |         | 2                             | _ |
| 3    | Add lines 1                | 7  | 3               |         |                               |   |
| Pa   | rt II Other                | Taxes  |                 |         |                               |   |
| 4    | Self-employ                | ment tax. Attach Schedule SE                             |                 | [       | 4                             |   |
| 5    | Social secu<br>Attach Form | rity and Medicare tax on unreported tip income.          | 5               |         |                               |   |
| 6    | Uncollected<br>Form 8919   | social security and Medicare tax on wages. Attach        | 6               |         |                               |   |
| 7    | Total additio              |  | 7               |         |                               |   |
| Q    | Additional ta              | ay on IBAs or other tay-favored accounts. Attach Form    | 5320 if roa     | uirod   |                               |   |

| -  |   | -      |                |
|----|---|--------|----------------|
| 8  | Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required.                             |        |                |
|    | If not required, check here $\ldots$ $\ldots$ $\ldots$ $\ldots$ $\ldots$ $\ldots$ $\ldots$ $\ldots$ $\times$    | 8      | 549.           |
| 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     |                |
| 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     |                |
|    | (cc   | ontini | ued on page 2) |
|    |   |        |                |

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

Schedule 2 (Form 1040) 2023

| Par | t II Other Taxes (continued)   |                  |        |                  |         |
|-----|--|------------------|--------|------------------|---------|
| 17  | Other additional taxes:  |                  |        |                  |         |
| а   | Recapture of other credits. List type, form number, and amount:  | 17a              |        |                  |         |
| b   | Recapture of federal mortgage subsidy, if you sold your home see instructions  | 17b              |        |                  |         |
| С   | 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              |        |                  |         |
| е   | Additional tax on Archer MSA distributions. Attach Form 8853 .   | 17e              |        |                  |         |
| f   | Additional tax on Medicare Advantage MSA distributions. Attach<br>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              |        |                  |         |
| I   | Tax on accumulation distribution of trusts   | 171              |        |                  |         |
| 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              |        |                  |         |
| 0   | Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR                        | 170              |        |                  |         |
| р   | 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  | Reserved for future use  |                  | 19     |                  |         |
| 20  | Section 965 net tax liability installment from Form 965-A  | 20               |        |                  |         |
| 21  | Add lines 4, 7 through 16, and 18. These are your <b>total other taxe</b> on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b. |                  | 21     | 5                | 549.    |
|     | ВАА  | REV 02/05/24 PRO | Schedu | ule 2 (Form 1040 | 0) 2023 |

Department of the Treasury

## **Additional Credits and Payments**

OMB No. 1545-0074 2

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

|     | Go to www.irs.gov/Form1040 for instructions and the latest information. |   |           |        |      | Attachment<br>Sequence No. <b>03</b> |
|-----|---|---|-----------|--------|------|--------------------------------------|
|     | .,  | orm 1040, 1040-SR, or 1040-NR                           |           |        |      | security number                      |
| Par | TAMMAD & FAT  | fundable Credits  |           | 767-5  | 50-6 | 5693                                 |
| 1   |   | credit. Attach Form 1116 if required                    |           |        | 1    |                                      |
| 2   | 0   | child and dependent care expenses from Form 244         |           |        |      |                                      |
|     | Form 2441   |   | · · · · · |        | 2    |                                      |
| 3   | Education c   | redits from Form 8863, line 19..........                |           |        | 3    |                                      |
| 4   | Retirement  | savings contributions credit. Attach Form 8880          |           |        | 4    |                                      |
| 5a  | Residential   | clean energy credit from Form 5695, line 15             |           |        | 5a   |                                      |
| b   | Energy effic  | ient home improvement credit from Form 5695, line 32    | 2         |        | 5b   |                                      |
| 6   | Other nonre   | fundable credits:                                       |           |        |      |                                      |
| а   | General bus   | siness credit. Attach Form 3800                         | 6a        |        | -    |                                      |
| b   | Credit for p  | rior year minimum tax. Attach Form 8801                 | 6b        |        | -    |                                      |
| С   | Adoption cr   | edit. Attach Form 8839                                  | 6c        |        | -    |                                      |
| d   | Credit for th   | e elderly or disabled. Attach Schedule R                | 6d        |        |      |                                      |
| е   | Reserved for  | or future use .................                         | 6e        |        |      |                                      |
| f   | Clean vehic   | le credit. Attach Form 8936                             | 6f        |        |      |                                      |
| g   | Mortgage in   | iterest credit. Attach Form 8396                        | 6g        |        |      |                                      |
| h   | District of C   | olumbia first-time homebuyer credit. Attach Form 8859   | 6h        |        |      |                                      |
| i   | Qualified ele   | ectric vehicle credit. Attach Form 8834                 | 6i        |        |      |                                      |
| j   | Alternative f   | uel vehicle refueling property credit. Attach Form 8911 | 6j        |        |      |                                      |
| k   | Credit to ho  | Iders of tax credit bonds. Attach Form 8912             | 6k        |        |      |                                      |
| Ι   | Amount on   | Form 8978, line 14. See instructions                    | 61        |        |      |                                      |
| m   | Credit for p  | reviously owned clean vehicles. Attach Form 8936 .      | 6m        |        |      |                                      |
| z   | Other nonre   | fundable credits. List type and amount:                 |           |        |      |                                      |
|     |   |   | 6z        |        |      |                                      |
| 7   | Total other   | nonrefundable credits. Add lines 6a through 6z          |           |        | 7    |                                      |
| 8   |   | through 4, 5a, 5b, and 7. Enter here and on Form 1      |           | SR, or | _    |                                      |
|     | 1040-NR, lir  | ne 20   |           |        | 8    |                                      |

(continued on page 2)

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

Schedule 3 (Form 1040) 2023

Schedule 3 (Form 1040) 2023

| Par | t II Other Payments and Refundable Credits                                    |              |        |                       |
|-----|---|--------------|--------|-----------------------|
| 9   | Net premium tax credit. Attach Form 8962                                      |              | 9      |                       |
| 10  | Amount paid with request for extension to file (see instructions) .           |              | 10     |                       |
| 11  | Excess social security and tier 1 RRTA tax withheld                           |              | 11     | 1,281.                |
| 12  | Credit for federal tax on fuels. Attach Form 4136                             |              | 12     |                       |
| 13  | Other payments or refundable credits:   |              |        |                       |
| а   | Form 2439   | 13a          |        |                       |
| b   | Credit for repayment of amounts included in income from earlier years         | 13b          |        |                       |
| С   | Elective payment election amount from Form 3800, Part III, line 6, column (i) | 13c          |        |                       |
| d   | Deferred amount of net 965 tax liability (see instructions)                   | 13d          |        |                       |
| z   | Other payments or refundable credits. List type and amount:                   |              |        |                       |
|     |   | 13z          |        |                       |
| 14  | Total other payments or refundable credits. Add lines 13a through             | 13z          | 14     |                       |
| 15  | Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040 line 31      |              | 15     | 1,281.                |
|     | BAA REV   | 02/05/24 PRO | Schedu | le 3 (Form 1040) 2023 |

| SCHEDULE    | С |
|-------------|---|
| (Form 1040) |   |

# Profit or Loss From Business (Sole Proprietorship) 0-SB, 1040-SS, 1040-NB, or 1041: partnerships must genera

| (Form 1040)  |  | (Sole Proprietorship) |          |   |          |   |            | 202   | 3                               |        |
|--|--|-----------------------|----------|---|----------|---|------------|-------|---------------------------------|--------|
| Department of the Treasury Attach to Form 1040, 1040-SR, 1040-SS, 1040-NR, or 1041; partnerships must generally file I |  |                       |          | Form 10   | A        | ttachment                               |            |       |                                 |        |
|  | Revenue Service                          | G                     | io to w  | ww.irs.gov/ScheduleC for  | ' instru | uctions and the latest information.     | <u> </u>   |       | equence No                      |        |
|  | of proprietor                            |                       |          |   |          |   |            | -     | number (                        | SSN)   |
| -  | AMMAD KHAN                               |                       |          |   |          | (1 )                                    |            | 50-66 |                                 |        |
| Α  | ·  | or protessic          | n, inci  | uding product or service (se                                      | e instr  | uctions)                                |            |       | om instructi                    |        |
| с  | SERVICE                                  | no concrete           | buoing   | ess name, leave blank.  |          |   |            |       | 2 1 (                           |        |
| 0  |  | •                     |          |   |          |   |            |       | umber (EIN)<br>0 6 3            |        |
| E  | AL-MUBDI EN                              |                       |          |   |          | WY OWI IANE                             | 0 /        | 2 0   | 0 0 3                           | 0 0    |
|  | City, town or post                       |                       |          | room no.) 15606 SV  |          |   |            |       |                                 |        |
| F  | Accounting metho                         |                       | Cash     |   |          | Others (and a if )                      |            |       |                                 |        |
| G  | 0  | ., -                  |          |   |          | 2023? If "No," see instructions for lir |            |       |                                 |        |
| H  |  |                       |          |   |          |   |            |       |                                 |        |
|  |  |                       |          |   |          | n(s) 1099? See instructions             |            |       |                                 | × No   |
| J  |  |                       |          |   |          | · · · · · · · · · · · · · · · · ·       |            |       |                                 |        |
| Part   |  | , this year inc       | requi    |   |          |   |            |       |                                 |        |
| 1  |  | sales. See ir         | nstructi | ons for line 1 and check the                                      | e box if | f this income was reported to you on    |            |       |                                 |        |
|  |  |                       |          |   |          | d                                       | 1          |       |                                 |        |
| 2  | Returns and allow                        | ances                 |          |   |          |   | 2          |       |                                 |        |
| 3  | Subtract line 2 fro                      | m line 1 .            |          |   |          |   | 3          |       |                                 |        |
| 4  | Cost of goods sol                        | d (from line          | 42) .    |   |          |   | 4          |       |                                 |        |
| 5  | Gross profit. Sub                        | tract line 4 f        | rom lin  | e3  |          |   | 5          |       |                                 |        |
| 6  |  | -                     |          | -   |          | refund (see instructions)               | 6          |       |                                 |        |
| 7  | Gross income. A                          | dd lines 5 ar         | nd 6 .   |   |          | · · · · · · · · · · · ·                 | 7          |       |                                 |        |
| Part   | II Expenses                              | s. Enter exp          | pense    | s for business use of yo  | pur ho   | ome <b>only</b> on line 30.             |            |       |                                 |        |
| 8  | Advertising                              |                       | 8        |   | 18       | Office expense (see instructions) .     | 18         |       |                                 |        |
| 9  | Car and truck                            | •                     |          |   | 19       | Pension and profit-sharing plans .      | 19         |       |                                 |        |
|  | (see instructions)                       |                       | 9        | 4,585.  | 20       | Rent or lease (see instructions):       |            |       | 2.0                             |        |
| 10   | Commissions and                          |                       | 10       |   | а        | Vehicles, machinery, and equipment      | 20a        |       | 30                              | ,000.  |
| 11   | Contract labor (see i                    |                       | 11       |   | b        | Other business property                 | 20b        |       |                                 |        |
| 12<br>13   | Depletion<br>Depreciation and s          |                       | 12       |   | 21       | Repairs and maintenance                 | 21         |       |                                 |        |
| 15   | expense deduc                            |                       |          |   | 22       | Supplies (not included in Part III) .   | 22         |       |                                 |        |
|  | included in Parl                         | , ,                   | 10       |   | 23       | Taxes and licenses                      | 23         |       |                                 |        |
|  |  |                       | 13       |   | 24       | Travel and meals:                       | 040        |       |                                 |        |
| 14   | Employee benefit (other than on line     |                       | 44       |   | a<br>b   | Travel                                  | 24a<br>24b |       |                                 |        |
| 15   | Insurance (other t                       | 2                     | 14<br>15 | 368.  | 25       | Utilities                               | 240        |       | 5                               | ,400.  |
| 16   | Interest (see instru                     |                       | 15       | 500.  | 26       | Wages (less employment credits)         | 26         |       |                                 | , 100. |
| a  | Mortgage (paid to                        | ,                     | 16a      |   | 27a      | Other expenses (from line 48)           | 27a        |       | 18                              | ,456.  |
| b  | Other                                    |                       | 16b      |   | b        | Energy efficient commercial bldgs       |            |       |                                 | ,      |
| 17   | Legal and professio                      |                       | 17       |   | 1 1      | deduction (attach Form 7205)            | 27b        |       |                                 |        |
| 28   | Total expenses b                         | efore expen           | ses for  | business use of home. Add   | lines    | 8 through 27b                           | 28         |       | 58                              | ,809.  |
| 29   | Tentative profit or                      | (loss). Subtr         | act line | e 28 from line 7  |          |   | 29         |       | -58                             | ,809.  |
| 30   | Expenses for bus                         | siness use o          | f your   | home. Do not report these   | e expe   | enses elsewhere. Attach Form 8829       |            |       |                                 |        |
|  | unless using the s                       |                       |          |   |          |   |            |       |                                 |        |
|  |  |                       |          | the total square footage of                                       | (a) yοι  |   |            |       |                                 |        |
|  | and (b) the part of                      | 5                     |          |   |          | . Use the Simplified                    |            |       |                                 |        |
|  |  |                       |          | s to figure the amount to en                                      | ter on   | line 30                                 | 30         |       |                                 |        |
| 31   | Net profit or (los                       |                       |          |   |          | ١                                       |            |       |                                 |        |
|  | checked the box                          | on line 1, see        | e instru | <b>1 (Form 1040), line 3,</b> and o octions.) Estates and trusts, |          |   | 31         |       | -58                             | ,809.  |
|  | • If a loss, you <b>mu</b>               | -                     |          |   |          | J                                       |            |       |                                 |        |
| 32   | If you have a loss                       | , check the b         | ox tha   | t describes your investment                                       | in this  | s activity. See instructions.           |            |       |                                 |        |
|  | SE, line 2. (If you<br>Form 1041, line 3 | checked the<br>3.     | box on   | on both Schedule 1 (Form<br>line 1, see the line 31 instruc       | tions.)  | Estates and trusts, enter on            | _          | _     | vestment is<br>e investme<br>k. |        |

REV 02/05/24 PRO

OMB No. 1545-0074

| Schedu<br>Part | le C (Form 1040) 2023 Cost of Goods Sold (see instructions)   | Page <b>2</b>            |
|----------------|---|--------------------------|
| r ar c         |   |                          |
| 33             | Method(s) used to value closing inventory: <b>a</b> Cost <b>b</b> Lower of cost or market <b>c</b> Other (attach  | explanation)             |
| 34             | Was there any change in determining quantities, costs, or valuations between opening and closing inventory? If "Yes," attach explanation  | . Yes No                 |
| 35             | Inventory at beginning of year. If different from last year's closing inventory, attach explanation   | 5                        |
| 36             | Purchases less cost of items withdrawn for personal use   | 6                        |
| 37             | Cost of labor. Do not include any amounts paid to yourself  | 7                        |
| 38             | Materials and supplies  | 8                        |
| 39             | Other costs   | 9                        |
| 40             | Add lines 35 through 39   | 0                        |
| 41             | Inventory at end of year  | 1                        |
| 42             | Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on line 4  |                          |
| Part           | Information on Your Vehicle. Complete this part only if you are claiming car or tru are not required to file Form 4562 for this business. See the instructions for line 13 t Form 4562. |                          |
| 43             | When did you place your vehicle in service for business purposes? (month/day/year) <u>11/02/2022</u>  | -                        |
| 44             | Of the total number of miles you drove your vehicle during 2023, enter the number of miles you used your vehi   | cle for:                 |
| а              | Business 7,000 b Commuting (see instructions) c Othe  | er2,000                  |
| 45             | Was your vehicle available for personal use during off-duty hours?  | 🗌 Yes 🛛 No               |
| 46             | Do you (or your spouse) have another vehicle available for personal use?  | 🗌 Yes 🛛 🗙 No             |
| 47a            | Do you have evidence to support your deduction?   | 🗌 Yes 🛛 🕅 No             |
| b<br>Part      | If "Yes," is the evidence written?  | Yes No<br>b, or line 30. |
|                |   |                          |
| BA             | CK OFFICE OPERATION EXPENSES  | 18,456.                  |
|                |   |                          |
|                |   | -                        |
|                |   |                          |
|                |   |                          |
|                |   |                          |
|                |   |                          |
|                |   |                          |
|                |   |                          |
|                |   |                          |
| 48             | Total other expenses. Enter here and on line 27a  | 8 18,456.                |

#### SCHEDULE D (Form 1040)

## **Capital Gains and Losses**

OMB No. 1545-0074

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

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

2023 Attachment Sequence No. 12

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

MUHAMMAD & FATIMA KHAN

Your social security number 767-50-6693

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

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

| lines | instructions for how to figure the amounts to enter on the below.<br>form may be easier to complete if you round off cents to   | <b>(d)</b><br>Proceeds<br>(sales price) | <b>(e)</b><br>Cost<br>(or other basis) | <b>(g)</b><br>Adjustments<br>to gain or loss fror<br>Form(s) 8949, Part |       | (e)<br>and |
|-------|---|---|--|---|-------|------------|
|       | e dollars.  | (sales price)                           |  | line 2, column (g)  |       |            |
| 1a    | Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b. |   |  |   |       |            |
| 1b    | Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked  | 127,038.                                | 136,629.                               | 96  | 59,49 | 5.         |
| 2     | Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked  |   |  |   |       |            |
| 3     | Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked  |   |  |   |       |            |
| 4     | Short-term gain from Form 6252 and short-term gain or (   | oss) from Forms 4                       | 684, 6781, and 88                      | 324 <b>4</b>  | 1     |            |
| 5     | Net short-term gain or (loss) from partnerships, Schedule(s) K-1  |   |  | usts from   | 5     |            |
| 6     | Short-term capital loss carryover. Enter the amount, if an <b>Worksheet</b> in the instructions   |   | -                                      | -   | 3 (   | )          |
| 7     | Net short-term capital gain or (loss). Combine lines 1a term capital gains or losses, go to Part II below. Otherwise  |   |  |   | -9,49 | 5.         |

#### Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions)

| lines<br>This | instructions for how to figure the amounts to enter on the<br>below.<br>form may be easier to complete if you round off cents to<br>e dollars.   | <b>(d)</b><br>Proceeds<br>(sales price) | <b>(e)</b><br>Cost<br>(or other basis) | <b>(g)</b><br>Adjustmen<br>to gain or loss<br>Form(s) 8949, I<br>line 2, colum | from<br>Part II, | (h) Gain or (loss)<br>Subtract column (e)<br>from column (d) and<br>combine the result<br>with column (g) |
|---------------|--|---|--|--|------------------|---|
| 8a            | Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b. |   |  |  |                  |   |
| 8b            | Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked   |   |  |  |                  |   |
| 9             | Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked   |   |  |  |                  |   |
| 10            | Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked.  |   |  |  |                  |   |
|               | Gain from Form 4797, Part I; long-term gain from Forms from Forms 4684, 6781, and 8824   |   | 11                                     |  |                  |   |
| 12<br>13      | Net long-term gain or (loss) from partnerships, S corporat<br>Capital gain distributions. See the instructions   | uie(s) K-i                              | 12<br>13                               |  |                  |   |
|               | Long-term capital loss carryover. Enter the amount, if any <b>Worksheet</b> in the instructions  | 14                                      | ( )                                    |  |                  |   |
| 15            | Net long-term capital gain or (loss). Combine lines 8a on the back .   | •                                       |  |  | 15               |   |

| Part | III Summary  |                     |
|------|--|---------------------|
| 16   | Combine lines 7 and 15 and enter the result  | <b>16</b> -9,495.   |
|      | • If line 16 is a <b>gain</b> , 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 <b>loss</b> , skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.   |                     |
|      | • If line 16 is <b>zero</b> , skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.   |                     |
| 17   | Are lines 15 and 16 <b>both</b> gains?   |                     |
|      | $\square$ No. Skip lines 18 through 21, and go to line 22.   |                     |
| 18   | If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet   | 18                  |
| 19   | If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet   | 19                  |
| 20   | <ul> <li>Are lines 18 and 19 both zero or blank and you are not filing Form 4952?</li> <li>Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below.</li> </ul> |                     |
|      | ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.   |                     |
| 21   | If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:  |                     |
|      | The loss on line 16; or     (\$3,000), or if married filing separately, (\$1,500)  | <b>21</b> ( 3,000.) |
|      | Note: When figuring which amount is smaller, treat both amounts as positive numbers.   |                     |
| 22   | Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?  |                     |
|      | ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16.   |                     |
|      | ☑ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.   |                     |

BAA REV 02/05/24 PRO

Schedule D (Form 1040) 2023

Form **8949** 

Department of the Treasury

Internal Revenue Service

## Sales and Other Dispositions of Capital Assets

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



Sequence No. 12A

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

Name(s) shown on returnSocial security number or taxpayer identification numberMUHAMMAD & FATIMA KHAN767-50-6693

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.

X (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)

(B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

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

| <b>1</b><br>(a)<br>Description of property   |                 | Date sold or                   | Proceeds                            | (e)         If you enter an amount in column (g),<br>enter a code in column (f).           (d)         Cost or other basis         enter a code in column (f).           See the Note below         See the separate instructions. |  | enter a code in column (f).<br>See the separate instructions. | <b>(h)</b><br>Gain or (loss)<br>Subtract column (e)           |
|--|-----------------|--------------------------------|-------------------------------------|--|--|---|---|
| (Example: 100 sh. XYZ Co.)   | (Mo., day, yr.) | disposed of<br>(Mo., day, yr.) | (sales price)<br>(see instructions) | and see <i>Column</i> (e)<br>in the separate<br>instructions.  | <b>(f)</b><br>Code(s) from<br>instructions | <b>(g)</b><br>Amount of<br>adjustment                         | from column (d) and<br>combine the result<br>with column (g). |
| MERRILL BANK OF AMERICA COMPANY  | 02/01/23        | 12/31/23                       | 127,038.                            | 136,629.   | W  | 96.   | -9,495.   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
|  |                 |                                |                                     |  |  |   |   |
| 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). |                 |                                | 127,038.                            | 136,629.   |  | 96.   | -9,495.   |

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

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

SCHEDULE 8812 (Form 1040)

#### Credits for Qualifying Children and Other Dependents

OMB No. 1545-0074

| Attach to | Form 10 | 40. 1040-SR | , or 1040-NR. |
|-----------|---------|-------------|---------------|
|           |         | ,           | ,             |

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

2023 Attachment Sequence No. 47

| Department of the Treasury<br>Internal Revenue Service |  |
|--|--|
| Name(s) shown on return                                |  |

| Name(s | ) shown on return   | Your                          | social | security number |  |
|--------|---|-------------------------------|--------|-----------------|--|
| MUHA   | MMAD & FATIMA KHAN  | 767-                          | -50-   | 6693            |  |
| Pai    | t I Child Tax Credit and Credit for Other Dependents  |                               |        |                 |  |
| 1      | Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR  |                               | 1      | 123,853.        |  |
| 2a     | Enter income from Puerto Rico that you excluded   |                               |        |                 |  |
| b      | Enter the amounts from lines 45 and 50 of your Form 2555  | 0.                            |        |                 |  |
| с      | Enter the amount from line 15 of your Form 4563         .          . <th .<="" th=""><th></th><th></th><th></th></th> | <th></th> <th></th> <th></th> |        |                 |  |
| d      | Add lines 2a through 2c   |                               | 2d     | 0.              |  |
| 3      | Add lines 1 and 2d  |                               | 3      | 123,853.        |  |
| 4      | Number of qualifying children under age 17 with the required social security number 4   | 2                             |        |                 |  |
| 5      | Multiply line 4 by \$2,000  |                               | 5      | 4,000.          |  |
| 6      | Number of other dependents, including any qualifying children who are not under age   |                               |        |                 |  |
|        | 17 or who do not have the required social security number   | 2                             |        |                 |  |
|        | Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resid  | ent                           |        |                 |  |
|        | alien. Also, do not include anyone you included on line 4.  |                               |        |                 |  |
| 7      | Multiply line 6 by \$500  | +                             | 7      | 1,000.          |  |
| 8      | Add lines 5 and 7   |                               | 8      | 5,000.          |  |
| 9      | Enter the amount shown below for your filing status.  |                               |        |                 |  |
|        | • Married filing jointly—\$400,000  |                               |        |                 |  |
|        | • All other filing statuses— $$200,000 \int \dots $   | •                             | 9      | 400,000.        |  |
| 10     | Subtract line 9 from line 3.  |                               |        |                 |  |
|        | • If zero or less, enter -0   |                               |        |                 |  |
|        | • If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For  |                               |        |                 |  |
|        | example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc.   | •                             | 10     | 0.              |  |
| 11     | Multiply line 10 by 5% (0.05)   | +                             | 11     | 0.              |  |
| 12     | Is the amount on line 8 more than the amount on line 11?  |                               | 12     | 5,000.          |  |
|        | ○ No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit Skip Parts II-A and II-B. Enter -0- on lines 14 and 27.   | edit.                         |        |                 |  |
|        | <b>Yes.</b> Subtract line 11 from line 8. Enter the result.   |                               |        |                 |  |
| 13     | Enter the amount from Credit Limit Worksheet A  | . [                           | 13     | 11,774.         |  |
| 14     | Enter the smaller of line 12 or line 13. This is your child tax credit and credit for other dependents  | . [                           | 14     | 5,000.          |  |
|        | Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.   |                               |        |                 |  |
|        | If the amount on line 12 is more than the amount on line 14, you may be able to take the <b>addition</b>  | nal ch                        | ild ta | x credit        |  |
|        | on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-N   |                               |        |                 |  |
|        |   |                               | -      |                 |  |

(also complete Schedule 3, line 11) before completing Part II-A.

For Paperwork Reduction Act Notice, see your tax return instructions. BAA REV 02/05/24 PRO Schedule 8812 (Form 1040) 2023

| Schedu   | le 8812 (Form 1040) 2023   |         | Page <b>2</b>        |
|----------|--|---------|----------------------|
| Part     | II-A Additional Child Tax Credit for All Filers  |         |                      |
| Cautio   | n: If you file Form 2555, you cannot claim the additional child tax credit.  |         |                      |
| 15       | Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lin                           | e 27    | 🗌                    |
| 16a      | Subtract line 14 from line 12. If zero, stop here; you cannot take the additional child tax credit. Skip Parts II-A                              |         |                      |
|          | and II-B. Enter -0- on line 27   | 16a     | 0.                   |
| b        | Number of qualifying children under 17 with the required social security number: x \$1,600.  |         |                      |
|          | 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     |                      |
|          | <b>TIP:</b> 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?   |         |                      |
|          | <b>No.</b> 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 $\ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots$ | 20      |                      |
|          | Next. On line 16b, is the amount \$4,800 or more?  |         |                      |
|          | <b>No.</b> 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.  |         |                      |
|          | <b>Yes.</b> 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     | , , , , , , , , , , , , , , , , , , ,  | IS OT H | vuerto 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, or  |         |                      |
|          | if you are a bona fide resident of Puerto Rico, see instructions   | -       |                      |
| 22       | Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form  |         |                      |
| 22       | 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13 . 22  | -       |                      |
| 23       | Add lines 21 and 22  | -       |                      |
| 24       | <b>1040 and</b><br><b>1040-SR filers:</b> Enter the total of the amounts from Form 1040 or 1040-SR, line 27, )                                   |         |                      |
|          | and Schedule 3 (Form 1040), line 11.   |         |                      |
|          | <b>1040-NR filers:</b> Enter the amount from Schedule 3 (Form 1040), line 11.  |         |                      |
| 25       | Subtract line 24 from line 23. If zero or less, enter -0   | 25      |                      |
| 23<br>26 | Enter the <b>larger</b> of line 20 or line 25  | 25      |                      |
| 20       | Next, enter the smaller of line 17 or line 26 on line 27.  | 20      |                      |
| Part     | 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      |                      |
|          | · · · · · · · · · · · · · · · · · · ·  |         | 812 (Form 1040) 2023 |

8 Form Department of the Treasury Internal Revenue Service

## Health Savings Accounts (HSAs)

OMB No. 1545-0074

3

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

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

| Attachment<br>Sequence No. <b>52</b>              |
|---|
| ber of HSA beneficiary.<br>HSAs, see instructions |
| <br>6600  |

20

| Name(s | ) shown on Form 1040, 1040-SR, or 1040-NR S  | ocial security n | imber c     | of HSA beneficiary.   |
|--------|--|------------------|-------------|-----------------------|
|        | lf   | both spouses h   | ave HS      | As, see instructions. |
|        | AMMAD KHAN   | 767-50           |             |                       |
|        | re you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance C   |                  | •           |                       |
| Part   | <b>HSA Contributions and Deduction.</b> See the instructions before completing the and both you and your spouse each have separate HSAs, complete a separate   |                  |             |                       |
| 1      | Check the box to indicate your coverage under a high-deductible health plan (HDHP) du See instructions   | ring 2023.       |             | If-only 🗴 Family      |
| 0      | HSA contributions you made for 2023 (or those made on your behalf), including those made   |                  |             |                       |
| 2      | unextended due date of your tax return that were for 2023. <b>Do not</b> include employer cor<br>contributions through a cafeteria plan, or rollovers. See instructions  | ntributions,     | 2           | 0.                    |
| 3      | If you were under age 55 at the end of 2023 and, on the first day of <b>every</b> month during were, or were considered, an eligible individual with the <b>same</b> coverage, enter \$3,850 (family coverage). <b>All others</b> , see the instructions for the amount to enter | \$7,750 for      | 3           | 7,750.                |
| 4      | Enter the amount you and your employer contributed to your Archer MSAs for 2023 from F lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during include any amount contributed to your spouse's Archer MSAs                                     | 2023, also       | 4           | 0                     |
| 5      | Subtract line 4 from line 3. If zero or less, enter -0   |                  | 5           | <u> </u>              |
|        | Enter the amount from line 5. But if you and your spouse each have separate HSAs and   |                  | 5           | 7,750.                |
| 6      | coverage under an HDHP at any time during 2023, see the instructions for the amount to en  | ter              | 6           | 7,750.                |
| 7      | If you were age 55 or older at the end of 2023, married, and you or your spouse had family under an HDHP at any time during 2023, enter your additional contribution amount. See inst  |                  | 7           |                       |
| 8      | Add lines 6 and 7  |                  | 8           | 7,750.                |
| 9      | Employer contributions made to your HSAs for 2023 9  | 7,750.           | -           |                       |
| 10     | Qualified HSA funding distributions  |                  |             |                       |
| 11     | Add lines 9 and 10   |                  | 11          | 7,750.                |
| 12     | Subtract line 11 from line 8. If zero or less, enter -0  |                  | 12          | 0.                    |
| 13     | HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Pa   | rt II, line 13   | 13          | 0.                    |
|        | Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instruction  | ıs.              |             |                       |
| Part   | <b>II HSA Distributions.</b> If you are filing jointly and both you and your spouse each a separate Part II for each spouse.   | have sepa        | rate I      | -ISAs, complete       |
| 14a    | Total distributions you received in 2023 from all HSAs (see instructions)  |                  | 14a         |                       |
| b      | Distributions included on line 14a that you rolled over to another HSA. Also include a contributions (and the earnings on those excess contributions) included on line 14a   |                  |             |                       |
|        | withdrawn by the due date of your return. See instructions   |                  | 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, in 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 <b>Exceptions to the Addition</b><br><b>Tax</b> (see instructions), check here   |                  |             |                       |
| h      | Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on li  |                  |             |                       |
| 5      | are subject to the additional 20% tax. Also, include this amount in the total on Schedu  | le 2 (Form       | <b>4</b> 76 |                       |
| Part   |  | <br>ho.inctainet | 17b         | oforo                 |
| Farl   | III Income and Additional Tax for Failure To Maintain HDHP Coverage. See t completing this part. If you are filing jointly and both you and your spouse eac complete a separate Part III for each spouse.  | h have sep       |             |                       |
| 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,  |                  | 20          |                       |
| 21     | Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedu   |                  |             |                       |
|        | 1040), Part II, line 17d   |                  | 21          |                       |

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

REV 02/05/24 PRO BAA

| Form | 88 | 67 |
|------|----|----|
|      |    |    |

#### (Rev. November 2023)

#### **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 and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS OMB No. 1545-0074

For tax year 20 23

| Department of the Treasury<br>Internal Revenue Service Go to www.irs.gov/Form8867 for instructions and the latest information. |                       | Attachment<br>Sequence No. <b>70</b> |             |
|--|-----------------------|--------------------------------------|-------------|
| Taxpayer name(s) shown on return   |                       | Taxpayer identification number       |             |
| MUHAMMAD & FAT   | 'IMA KHAN             | 767-50-6693                          | 3           |
| Preparer's name  |                       | Preparer tax identifica              | tion number |
| VENKATA SAT PA   | VAN KIIMAR DIIDTPALLT | P02470833                            |             |

#### **Due Diligence Requirements** Part I

Please check the appropriate box for the credit(s) and/or HOH filing status claimed on the return and complete the related Parts I-V for the benefit(s) claimed (check all that apply). EIC X CTC/ACTC/ODC 🗌 НОН 

| 1 | Did you complete the return based on information for the applicable tax year provided by the taxpayer  | Yes | No | N/A |
|---|--|-----|----|-----|
|   | or reasonably obtained by you?   | X   |    |     |
| 2 | If credits are claimed on the return, did you complete the applicable EIC and/or CTC/ACTC/ODC worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Schedule 8812 (Form 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instructions, or your own worksheet(s) that provides the same information, and all related forms and schedules for each credit claimed?   | ×   |    |     |
| 2 |  |     |    |     |
| 3 | Did you satisfy the knowledge requirement? To meet the knowledge requirement, you must do both of the following.   |     |    |     |
|   | <ul> <li>Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's responses to<br/>determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status.</li> </ul>   |     |    |     |
|   | • Review information to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing   |     |    |     |
|   | 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 the return, or information reasonably known to you, appear to be incorrect, incomplete, or inconsistent? (If <b>"Yes</b> ,"   |     |    |     |
|   | answer questions 4a and 4b. If " <b>No</b> ," go to question 5.)   |     | ×  |     |
| a | Did you make reasonable inquiries to determine the correct, complete, and consistent information?  |     |    |     |
| b | Did you contemporaneously document your inquiries? (Documentation should include the questions you asked, whom you asked, when you asked, the information that was provided, and the impact the  |     |    |     |
|   | information had on your preparation of the return.)  |     |    |     |
| 5 | Did you satisfy the record retention requirement? To meet the record retention requirement, you must keep a copy of your documentation referenced in question 4b, a copy of this Form 8867, a copy of any applicable worksheet(s), a record of how, when, and from whom the information used to prepare Form 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) provided by the taxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing status or to figure |     |    |     |
|   | the amount(s) of the credit(s)   | ×   |    |     |
|   | List those documents provided by the taxpayer, if any, that you relied on:   |     |    |     |
|   |  |     |    |     |
|   |  |     |    |     |
|   |  |     |    |     |
| 6 | Did you ask the taxpayer whether he/she could provide documentation to substantiate eligibility for the credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return if his/her return is selected for audit?   |     |    |     |
| 7 | Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous year?  | X   |    |     |
| ' | (If credits were disallowed or reduced, go to question 7a; if not, go to question 8.)  |     |    |     |
| а | Did you complete the required recertification Form 8862?   |     |    |     |
|   |  |     |    |     |

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

For Paperwork Reduction Act Notice, see separate instructions.

REV 02/05/24 PRO

Form 8867 (Rev. 11-2023)

X

| Form 88 | 367 (Rev. 11-2023)  |            |         | Page <b>2</b> |
|---------|---|------------|---------|---------------|
| Part    | II Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go   | to Part    | III.)   |               |
| 9a      | Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.)  | Yes        | No      | N/A           |
| b       | Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer 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    | III Due Diligence Questions for Returns Claiming CTC/ACTC/ODC (If the return does not or ODC, go to Part IV.)   | claim C    | CTC, A  | СТС,          |
| 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<br>X   | No      | N/A           |
| 11      | Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child?   | X          |         |               |
| 12      | Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return?   | X          |         |               |
| Part    |   | , go to    | Part \  | /.)           |
| 13      | Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qu tuition and related expenses for the claimed AOTC?   |            | Yes     | No            |
| Part    |   | s, go to   | o Part  | VI.)          |
| 14      | Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax<br>and provided more than half of the cost of keeping up a home for the year for a qualifying person?  |            | Yes     | No            |
| Part    | <ul> <li>Eligibility Certification</li> <li>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:</li> <li>A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's response in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(s) status and to figure the amount(s) of the credit(s);</li> </ul> | nses on    | the ret | urn or        |
|         | <ul> <li>B. Complete this Form 8867 truthfully and accurately and complete the actions described in this check credit(s) claimed and HOH filing status, if claimed;</li> </ul>  | list for a | iny app | licable       |
|         | <ul> <li>C. Submit Form 8867 in the manner required; and</li> <li>D. Keep all five of the following records for 3 years from the latest of the dates specified in the Form 88 <i>Document Retention</i>.</li> <li>1. A copy of this Form 8867.</li> <li>2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.</li> </ul>   | 67 instri  | uctions | under         |
|         |   |            |         |               |

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

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

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

REV 02/05/24 PRO

Form 8867 (Rev. 11-2023)

## Additional Information From 2023 Federal Tax Return

#### Schedule C (SERVICE): Profit or Loss from Business

| Line 15      | Itemization Statement |  |  |
|--------------|-----------------------|--|--|
| Description  | Amount                |  |  |
| LLC INURANCE | 368.                  |  |  |
| Tota         | 368.                  |  |  |

# Schedule C (SERVICE): Profit or Loss from Business

| Line 25                  | Itemization Statement |
|--------------------------|-----------------------|
| Description              | Amount                |
| MOBILE(12M**\$210PM))    | 2,520.                |
| INTERNET(12M*\$90PM)     | 1,080.                |
| ELECTRICTY(12M*\$150PM)) | 1,800.                |
| Total                    | 5,400.                |

1

#### **Itemization Statement**