Form **8879**

(Rev. January 2021)

Department of the Treasury Internal Revenue Service

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

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

OMB No. 1545-0074

Submission Identification Number (SID)			
Taxpayer's name	Social security	number	—
NAGAMANI KATTA	375-69-	5235	
Spouse's name		al security number	
PRUDHVI MACHINENI	893-06-	4508	
Part I Tax Return Information — Tax Year Ending December 31, 2023 (Ent	er year you ar	e 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.	1	1	
1 Adjusted gross income	-	1 200,32	
2 Total tax		2 24,27	
3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099	⊢	3 34,95	
4 Amount you want refunded to you	⊢	4 10,68	<u>7.</u>
5 Amount you owe			
Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amende			
return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, trans to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for refor any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account in payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to termina payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation rebusiness days prior to the payment (settlement) date. I also authorize the financial institutions involved in the taxes to receive confidential information necessary to answer inquiries and resolve issues related to the personal identification number (PIN) below is my signature for the income tax return (original or amended) I Electronic Funds Withdrawal Consent.	ejection of the tra U.S. Treasury andicated in the taxtion to debit the earte the authorization are processing of the payment. I furth	nsmission, (b) the read its designated Finant preparation software entry to this account. ion. To revoke (cancereceived no later that the electronic paymenter acknowledge that	ason notal refor This cel) a an 2 ant of
Taxpayer's PIN: check one box only			
▼ I authorize GLOBAL TAXES LLC to enter or generate	e mv PIN	5 2 3 5 as	my
ERO firm name	Ente	er five digits, but	,
signature on the income tax return (original or amended) I am now authorizing.			
I will enter my PIN as my signature on the income tax return (original or amended) I am if you are entering your own PIN and your return is filed using the Practitioner PIN me below.			
Your signature ▶ Date ▶			
Chausaia Dibly shook one hay only			
Spouse's PIN: check one box only X authorize GLOBAL TAXES LLC to enter or generate	e mv PIN 6	4 5 0 8 as	
★ I authorize GLOBAL TAXES LLC to enter or generate ★ ERO firm name	,	4 5 0 8 as	my
signature on the income tax return (original or amended) I am now authorizing.		t enter all zeros	
I will enter my PIN as my signature on the income tax return (original or amended) I am if you are entering your own PIN and your return is filed using the Practitioner PIN me below.		•	-
Spouse's signature ▶ Date ▶			
Practitioner PIN Method Returns Only—continue belo	w		_
Part III Certification and Authentication — Practitioner PIN Method Only			
ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 2	2 2 4 9 6 Don't enter		
I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am sub requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS <i>e-file</i> Providers of	mitting this retur	n in accordance with	now า the
ERO's signature ▶ Date ▶			
ERO Must Retain This Form — See Instructions			

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

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

1040		artment of the Treasury-Internal Revenue Servi		urn	202	3	OMB No. 1545	-0074	IRS Use	e Only-	-Do not w	rite or sta	ıple in this sp	oace.
For the year Jan	ı. 1–Dec	c. 31, 2023, or other tax year beginning			, 2023, end	ling	<u>'</u>		, 20		See ser	oarate i	nstruction	ns.
Your first name	and m	iddle initial	Last na	me	 -						Your so	cial sec	urity numb	ber
NAGAMAN]	Ε		KATT	'A							375	69	5235	
		s first name and middle initial	Last na								Spouse'		security n	umber
PRUDHVI			MACH	INENI							893	06	4508	
	(numbe	er and street). If you have a P.O. box, see						A	Apt. no.				ction Cam	npaign
28287 N	132	ND LN								- 1			ou, or you	. •
		ice. If you have a foreign address, also co	mplete s	paces belo	ow.	Sta	te	ZIP c	ode		•	.	jointly, wa	
PEORIA						AZ	Z	853	83		•		nd. Checki not change	_
Foreign country	/ name		F	Foreign pro	ovince/state/o	count	ty	Foreig	n postal c		your tax		•	C
												Yo	u 🗌 Si	pouse
Filing Status	<u>. </u>	Single					Head of he	ouseh	old (HOI	H)				
Check only	×	Married filing jointly (even if only o	ne had i	ncome)					•	,				
one box.		Married filing separately (MFS)					☐ Qualifying	surviv	ing spo	use (0	QSS)			
	If y	you checked the MFS box, enter the	name c	of your sp	ouse. If you	ı che	ecked the HOF	or Q	SS box,	enter	the chi	ld's na	me if the	
	qu	ıalifying person is a child but not you	ır depen	ndent:										
	Λ± α.	ny time during 2023, did you: (a) rec	sive (se											
Digital Assets		ny time during 2023, did you: (a) rec nange, or otherwise dispose of a dig										ΠYe	es 🛛 N	lo
Standard		neone can claim: You as a de					a dependent	,,, (0	JC IIIJEIG	Otion	J.,		.5 🔼 11	
Deduction		Spouse itemizes on a separate retur	•											
Deddotton	<u> </u>		11 O1 yOu	-	dai Status	ancii	<u>'</u>							
Age/Blindness	You	: Were born before January 2, 1	959 _	_ Are bli	nd Spc	ouse	: U Was bor						blind	
Dependents					ocial security	,	(3) Relationsh	ip (4			1		see instruc	
If more	(1) F	irst name Last name			number		to you		Child 1		edit	Credit to	r other depe	endents
than four	AV	YAN MACHINENI			-59-973		Son			<u>×</u>			_Ц	
dependents, see instructions	s ANY	VITH MACHINENI		051-	-75-279	4	Son			<u>×</u>			ᆜ	
and check	. —									<u> </u>			Щ_	
here L				L										
Income	1a	Total amount from Form(s) W-2, b	,		,						1a	_	220,68	81.
Attach Form(s)	b	Household employee wages not re									1b	_		
W-2 here. Also	С.	Tip income not reported on line 1a	•		-						1c	_		
attach Forms W-2G and	d	Medicaid waiver payments not rep		٠,		nstru	ictions)				1d	_		
1099-R if tax	e	Taxable dependent care benefits f									1e			
was withheld.	f	Employer-provided adoption bene	tits from	1 Form 88	339, line 29	•					1f			
If you did not get a Form	g	Wages from Form 8919, line 6 .									1g			
W-2, see	h	Other earned income (see instruct	,					· ·			1h			0.
instructions.	i	Nontaxable combat pay election (s	see instr	ructions)			<u>1i</u>						220 6	01
AII	z	Add lines 1a through 1h			· · i	 L T					1z	_	220,68	<u>от.</u>
Attach Sch. B if required.	2a		2a				axable interest				2b			
	3a_		3a				ordinary divide				3b			
Standard	4a		4a				axable amoun				4b			
Deduction for—	5a	-	5a				axable amoun				5b			
Single or Married filing	6a	,	6a	mothed :			axable amoun	ι			6b			
separately, \$13,850	C 7	If you elect to use the lump-sum e				•	,				-		_3 O	00
Married filing	7	Capital gain or (loss). Attach Sche		•			•			. ∟	7		-3,00 -17,30	
jointly or Qualifying	8	Add lines 17, 2h, 3h, 4h, 5h, 6h, 7	•								9	-	200,3	
surviving spouse, \$27,700	9 10	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7		•									<u></u>	۷٠.
Head of	10	Adjustments to income from Sche									10		200 2	20
household, [11	Subtract line 10 from line 9. This is	-	-	_						11		200,3	
If you checked	12	Standard deduction or itemized				,	 5 A				12	_	27,7	υυ.
any box under Standard	13	Qualified business income deduct									13		27 7	0.0
Deduction, see instructions.	14 15	Add lines 12 and 13					 tavabla incom				14		27,70	

Form 1040 (2023	3)								Page Z
Tax and	16	Tax (see instructions). Check	if any from Form	(s): 1 881	4 2 4972	з 🗌		16	28,591.
Credits	17	Amount from Schedule 2, lir	ne 3					17	
	18	Add lines 16 and 17						18	28,591.
	19	Child tax credit or credit for	other dependent	ts from Sched	ule 8812			19	4,000.
	20	Amount from Schedule 3, lir	ne 8					20	319.
	21	Add lines 19 and 20						21	4,319.
	22	Subtract line 21 from line 18	. If zero or less,	enter -0				22	24,272.
	23	Other taxes, including self-e	mployment tax,	from Schedule	e 2, line 21			23	0.
	24	Add lines 22 and 23. This is	your total tax					24	24,272.
Payments	25	Federal income tax withheld	from:						
_	а	Form(s) W-2				25a 34	1,959		
	b	Form(s) 1099				25b			
	С	Other forms (see instruction	s)			25c			
	d	Add lines 25a through 25c						25d	34,959.
If you have a	26	2023 estimated tax paymen	ts and amount a	pplied from 20)22 return			26	
qualifying child, attach Sch. EIC.	27	Earned income credit (EIC)			No .	27			
allacii Scii. Elc.	28	Additional child tax credit from	m Schedule 8812			28			
	29	American opportunity credit	from Form 8863	3, line 8		29			
	30	Reserved for future use .				30			
	31	Amount from Schedule 3, lir	ne 15			31			
	32	Add lines 27, 28, 29, and 31	. These are your	total other pa	ayments and refu	ndable credits		32	
	33	Add lines 25d, 26, and 32. T	hese are your to	tal payments				33	34,959.
Refund	34	If line 33 is more than line 24	4, subtract line 2	4 from line 33.	This is the amour	nt you overpaid		34	10,687.
	35a	Amount of line 34 you want	refunded to you	ı. If Form 8888	is attached, chec	k here	🗆	35a	10,687.
Direct deposit?	b	Routing number 0 5 1			,, <u> </u>	Checking	Savings	s	
See instructions.	d	Account number 4 3 5	0 4 0 4	2 5 8 2	1 2				
	36	Amount of line 34 you want	applied to your	2024 estimate	ed tax	36			
Amount You Owe	37	Subtract line 33 from line 24 For details on how to pay, g						37	
	38	Estimated tax penalty (see in	nstructions) .			38			
Third Party	Do	you want to allow another				See			
Designee		•	•			_	omplete	e below.	⋉ No
		signee's		Phone				ntification	
		me		no.			ber (PIN)		
Sign		der penalties of perjury, I declare the lief, they are true, correct, and com			, , ,		,		,
Here		ur signature	,	Date	Your occupation				nt you an Identity
	10	ur signature		Date	Tour occupation				PIN, enter it here
Joint return?					IT PROFESS	SIONALS		ee inst.)	
See instructions.		ouse's signature. If a joint return, I	both must sign.	Date	Spouse's occupati	on			nt your spouse an
Keep a copy for your records.						TONIAT C		entity Prote e inst.)	ection PIN, enter it here
		(202) 550 675	1	Consil address	IT PROFESS				
-		one no. (202)550-675 eparer's name	4 Preparer's signat	Email address	SAINAGAMANIK	ATTA@GMAIL.C Date	PTIN		Check if:
Paid		•	'		מווחתה תחוד איי			02702	Self-employed
Preparer		SYAM PRIYA RAM SAGAR GUPTA TALLAM SYAM PRIYA RAM SAGAR GUPTA TALLAM 02/18/2024 P0208							
Use Only		m's name GLOBAL TA		INIGHTON NT 00016					(678)965-9522
	Fir	m's address 245 ROONE	Y CT E BRU	NSWICK No	J 08816		Fir	m's EIN	84-3171965

SCHEDULE 1 (Form 1040)

Additional Income and Adjustments to Income

OMB No. 1545-0074

2023
Attachment
Sequence No. 01

Department of the Treasury Internal Revenue Service

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

NAGAMANI KATTA & PRUDHVI MACHINENI

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

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

Your social security number 375-69-5235

Par	t I Additional Income			
1	Taxable refunds, credits, or offsets of state and local income taxes		1	
2a	Alimony received		2a	
b	Date of original divorce or separation agreement (see instructions):			
3	Business income or (loss). Attach Schedule C		3	
4	Other gains or (losses). Attach Form 4797		4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Att		5	-17,361.
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			
	instructions)	8m		
n	Section 951(a) inclusion (see instructions)	8n		
0	Section 951A(a) inclusion (see instructions)	80		
р	Section 461(I) excess business loss adjustment	8p		
q	Taxable distributions from an ABLE account (see instructions)	8q		
r	Scholarship and fellowship grants not reported on Form W-2	8r		
S	Nontaxable amount of Medicaid waiver payments included on Form			
	1040, line 1a or 1d	8s ()	
t	Pension or annuity from a nonqualifed deferred compensation plan or			
	a nongovernmental section 457 plan	8t		
u	Wages earned while incarcerated	8u		
Z	Other income. List type and amount:			
		8z		
9	Total other income. Add lines 8a through 8z		9	
10	Combine lines 1 through 7 and 9. This is your additional income . Ente 1040, 1040-SR, or 1040-NR, line 8			-17,361.

Page **2** Schedule 1 (Form 1040) 2023

Par	Adjustments to Income				
11	Educator expenses			11	
12	Certain business expenses of reservists, performing artists, and fee				
	officials. Attach Form 2106			12	
13	Health savings account deduction. Attach Form 8889			13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903			14	
15	Deductible part of self-employment tax. Attach Schedule SE			15	
16	Self-employed SEP, SIMPLE, and qualified plans			16	
17	Self-employed health insurance deduction			17	
18	Penalty on early withdrawal of savings			18	
19a	Alimony paid			19a	
b	Recipient's SSN	·			
С	Date of original divorce or separation agreement (see instructions):				
20	IRA deduction			20	
21	Student loan interest deduction			21	
22	Reserved for future use			22	
23	Archer MSA deduction			23	
24	Other adjustments:				
а	Jury duty pay (see instructions)	24a			
b	Deductible expenses related to income reported on line 8l from the				
	rental of personal property engaged in for profit	24b			
С	Nontaxable amount of the value of Olympic and Paralympic medals				
	and USOC prize money reported on line 8m	24c			
d	Reforestation amortization and expenses	24d			
е	Repayment of supplemental unemployment benefits under the Trade				
	Act of 1974	24e			
f	Contributions to section 501(c)(18)(D) pension plans	24f		-	
g	Contributions by certain chaplains to section 403(b) plans	24g		-	
h	Attorney fees and court costs for actions involving certain unlawful				
	discrimination claims (see instructions)	24h		-	
i	Attorney fees and court costs you paid in connection with an award				
	from the IRS for information you provided that helped the IRS detect				
	tax law violations	24i		-	
J	Housing deduction from Form 2555	24j		-	
k	Excess deductions of section 67(e) expenses from Schedule K-1 (Form				
	1041)	24k		-	
Z	Other adjustments. List type and amount:				
05	Tatal allows allow to some Add lines Ode thousands Ode	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 Form 1040, 1040-SR, or 1040-NR, line 10	. ∟nter	nere and on		
				26	I. 4 (F 1010) 0000
	BAA	REV 02/	11/24 PRO	Schedu	le 1 (Form 1040) 2023

SCHEDULE 3 (Form 1040)

Department of the Treasury Internal Revenue Service

Additional Credits and Payments

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

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

OMB No. 1545-0074

2023
Attachment Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR NAGAMANI KATTA & PRUDHVI MACHINENI

Your social security number 375-69-5235

Par	Nonrefundable Credits			
1	Foreign tax credit. Attach Form 1116 if required		1	
2	Credit for child and dependent care expenses from Form 2441, Form 2441	line 11. Attach	2	319.
3	Education credits 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 efficient home improvement credit from Form 5695, line 32		5b	
6	Other nonrefundable credits:			
а	General business credit. Attach Form 3800 6	a		
b	Credit for prior year minimum tax. Attach Form 8801	b		
С	Adoption credit. Attach Form 8839	ic		
d	Credit for the elderly or disabled. Attach Schedule R 6	d		
е	Reserved for future use	ie		
f	Clean vehicle credit. Attach Form 8936	6f		
g	Mortgage interest credit. Attach Form 8396 6	g		
h	District of Columbia first-time homebuyer credit. Attach Form 8859 6	h		
i	Qualified electric vehicle credit. Attach Form 8834	Si .		
j	Alternative fuel vehicle refueling property credit. Attach Form 8911)j		
k	Credit to holders of tax credit bonds. Attach Form 8912 6	k		
ı	Amount on Form 8978, line 14. See instructions	SI .		
m	Credit for previously owned clean vehicles. Attach Form 8936.	m		
z	Other nonrefundable credits. List type and amount:			
		iz		
7	Total other nonrefundable credits. Add lines 6a through 6z		7	
8	Add lines 1 through 4, 5a, 5b, and 7. Enter here and on Form 104	10, 1040-SR, or		
	1040-NR, line 20		8	319.
		(Co	ontinu	ed on page 2)

Schedule 3 (Form 1040) 2023 Page **2**

Par	Other Payments and Refundable Credits				
9	Net premium tax credit. Attach Form 8962			9	
10	Amount paid with request for extension to file (see instructions) .			10	
11	Excess social security and tier 1 RRTA tax withheld			11	
12	Credit for federal tax on fuels. Attach Form 4136			12	
13	Other payments or refundable credits:				
а	Form 2439	13a			
b	Credit for 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	

SCHEDULE D (Form 1040)

Department of the Treasury

Capital Gains and Losses

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.

OMB No. 1545-0074

2023

Attachment Sequence No. **12**

Internal Revenue Service Name(s) shown on return Your social security number 375-69-5235 NAGAMANI KATTA & PRUDHVI MACHINENI Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? If "Yes." attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss. Short-Term Capital Gains and Losses - Generally Assets Held One Year or Less (see instructions) Part I See instructions for how to figure the amounts to enter on the (h) Gain or (loss) (g) Adjustments Subtract column (e) lines below. Proceeds Cost to gain or loss from from column (d) and This form may be easier to complete if you round off cents to Form(s) 8949, Part I, combine the result (sales price) (or other basis) whole dollars. line 2. column (a) with column (a) 1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b . **1b** Totals for all transactions reported on Form(s) 8949 with Box A checked 10,602. 13,459. 940. -1,917. Totals for all transactions reported on Form(s) 8949 with Box B checked 3 Totals for all transactions reported on Form(s) 8949 with Box C checked Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 4 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from 5 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover 130,942.) 6 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h), If you have any longterm capital gains or losses, go to Part II below. Otherwise, go to Part III on the back 7 -132,859. Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions) See instructions for how to figure the amounts to enter on the (g) (h) Gain or (loss) Adjustments Subtract column (e) (d) (e) lines below. Proceeds to gain or loss from from column (d) and Cost This form may be easier to complete if you round off cents to Form(s) 8949, Part II, (sales price) (or other basis) combine the result whole dollars. line 2. column (a) with column (a) 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 Totals for all transactions reported on Form(s) 8949 with Box E checked 10 Totals for all transactions reported on Form(s) 8949 with 11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) 11 12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 12 13 14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover 14

15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III

15

Schedule D (Form 1040) 2023 Page 2

Part III **Summary** -132,859. 16 Combine lines 7 and 15 and enter the result 16 • If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22. 17 Are lines 15 and 16 both gains? ☐ **Yes.** Go to line 18. No. Skip lines 18 through 21, and go to line 22. 18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet 18 19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet . . . 19 20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below. If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: 21 • The loss on line 16; or 21 3,000.) • (\$3,000), or if married filing separately, (\$1,500) **Note:** When figuring which amount is smaller, treat both amounts as positive numbers. Do you have gualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? 22 ☐ 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.

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

OMB No. 1545-0074 Attachment

Sequence No. 12A

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

NAGAMANI KATTA & PRUDHVI MACHINENI

Social security number or taxpayer identification number

375-69-5235

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

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.

reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on

☒ (A) Short-term transactions☐ (B) Short-term transactions☐ (C) Short-term transactions	reported on	Form(s) 1099	9-B showing bas	•		•))
1 (a) Description of property	(b) Date acquired	(c) Date sold or	(d) Proceeds	(e) Cost or other basis See the Note below	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e)
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of (Mo., day, yr.)	(sales price) (see instructions)	and see Column (e) in the separate instructions.	(f) Code(s) from instructions	(f) (g) Code(s) from Amount of	from column (d) and combine the result with column (g).
ROBINHOOD SECURITIES LLC	01/01/23	12/31/23	9,660.	11,992.	W	830.	-1,502.
ROBINHOOD SECURITIES LLC	01/01/23	12/31/23	942.	1,467.	W	110.	-415.
2 Totals. Add the amounts in column negative amounts). Enter each tot Schedule D, line 1b (if Box A above above is checked), or line 3 (if Box	al here and ince is checked), lir	lude on your ne 2 (if Box B	10,602.	13,459.		940.	-1,917.

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.

SCHEDULE E (Form 1040)

Supplemental Income and Loss

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

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

Your social security number

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

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

Attachment Sequence No. 13

OMB No. 1545-0074

NAGA	MANI KATTA &	PRUDHVI MACHINENI						375-6	9-5235		
Part		Loss From Rental Real Estate and									
	Note: If you a	are in the business of renting personal proper or loss from Form 4835 on page 2, line 40.	ty, use	Schedule	C. See	instru	ctions. If you a	re an indiv	ridual, rep	ort farm	
Α [payments in 2023 that would require you	to file F	Form(s) 1	0992.5	See ins	structions			s X No	-
		s of each property (street, city, state, ZIF									-
A		EMARALD, HYDERABAD TELANGAN			Е						-
B	GRAND VIEW I	EMARALD, HIDERABAD IELANGAN	IA III	30008	3						-
C											-
1b	Type of Property	2 For each rental real estate prope	rtv liste			Fa	ir Rental	Person	al I lea		-
	(from list below)	above, report the number of fair i					Days	Da		QJV	
Α	3	personal use days. Check the QJ			Α		365		0		-
В		if you meet the requirements to fi qualified joint venture. See instru			В						
С		qualified joint venture. See instru	otions.		С						
	of Property:										
	Single Family Resid		tal	5 Land			Self-Rental				
2	Multi-Family Resid	lence 4 Commercial		6 Roya	Ities	8	Other (descr	ibe)			-
							Properti	es:			
Incom	ne:				Α		В			С	
3			3		6	00.					
4		d	4								_
Exper			_								
5			5								_
6		see instructions)	6		1 7	٥٢					-
7 8		intenance	7		1,7	∠5.					_
9			9								-
10		professional fees	10								-
11		S	11		1,3	20.					-
12		t paid to banks, etc. (see instructions)	12								-
13			13								
14			14		3,6	75.					
15	Supplies		15		3,1	52.					
16			16								
17			17			96.					_
18		ense or depletion	18		3,7	93.					_
19		N.I.I. I'm - 5 Herrord 40	19		1	<i>c</i> 1					_
20	•	Add lines 5 through 19	20		17,9	61.					-
21		rom line 3 (rents) and/or 4 (royalties). If see instructions to find out if you must									
	file Form 6198 .	•	21	_	-17,3	61.					
22		real estate loss after limitation, if any,				-					-
		ee instructions)	22 (17,36	51.)	()	()
23a	Total of all amoun	nts reported on line 3 for all rental prope	rties			23a		600.			Ī
b	Total of all amoun	nts reported on line 4 for all royalty prope	erties			23b					
С		nts reported on line 12 for all properties				23c					
d		nts reported on line 18 for all properties				23d		,793.			
е		nts reported on line 20 for all properties				23e	17	,961.			
24	-	sitive amounts shown on line 21. Do not		-				. 24	, .	1.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0.0	_
25	•	ty losses from line 21 and rental real estate								17,361.)
26		estate and royalty income or (loss). (II, and IV, and line 40 on page 2 do no									
		n, and iv, and line 40 on page 2 do no n 1040). line 5. Otherwise, include this ar						'' 26		-17.361	

Form **2441**

Department of the Treasury

Child and Dependent Care Expenses

Attach to Form 1040, 1040-SR, or 1040-NR. Go to www.irs.gov/Form2441 for instructions and the latest information. OMB No. 1545-0074 Attachment

Sequence No. 21 Internal Revenue Service Name(s) shown on return Your social security number 375-69-5235 NAGAMANI KATTA & PRUDHVI MACHINENI A You can't claim a credit for child and dependent care expenses if your filing status is married filing separately unless you meet the requirements listed in the instructions under Married Persons Filing Separately. If you meet these requirements, check this box. B If you or your spouse was a student or was disabled during 2023 and you're entering deemed income of \$250 or \$500 a month on Form 2441 based on the income rules listed in the instructions under If You or Your Spouse Was a Student or Disabled, check this box. Persons or Organizations Who Provided the Care—You must complete this part. If you have more than three care providers, see the instructions and check this box (d) Was the care provider your household employee in 2023? (c) Identifying number 1 (a) Care provider's (b) Address (e) Amount paid For example, this generally includes (number, street, apt. no., city, state, and ZIP code) name (SSN or EIN) (see instructions) nannies but not daycare centers. (see instructions) 28570N. EL MIRAGE RD. Yes X No 47-1369831 BIG DREAMS PEORIA AZ 85383 1,596. Yes □No ☐ Yes □No Complete only Part II below. Did you receive dependent care benefits? Complete Part III on page 2 next. Caution: If the care provider is your household employee, you may owe employment taxes. For details, see the Instructions for Schedule H (Form 1040). If you incurred care expenses in 2023 but didn't pay them until 2024, or if you prepaid in 2023 for care to be provided in 2024, don't include these expenses in column (d) of line 2 for 2023. See the instructions. **Credit for Child and Dependent Care Expenses** Part II Information about your qualifying person(s). If you have more than three qualifying persons, see the instructions and check this box (c) Check here if the (d) Qualified expenses (a) Qualifying person's name (b) Qualifying person's you incurred and paid qualifying person was over in 2023 for the person social security number age 12 and was disabled. First Last (see instructions) listed in column (a) 1,596. AVYAN MACHINENI 299-59-9737 Add the amounts in column (d) of line 2. **Don't** enter more than \$3,000 if you had one qualifying person 3 or \$6,000 if you had two or more persons. If you completed Part III, enter the amount from line 31 3 1,596. Enter your **earned income**. See instructions 4 4 127,776. If married filing jointly, enter your spouse's earned income (if you or your spouse was a student 5 or was disabled, see the instructions); all others, enter the amount from line 4 . . . 5 92,905. 1,596. 6 Enter the **smallest** of line 3, 4, or 5 Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 11 . . . 7 Enter on line 8 the decimal amount shown below that applies to the amount on line 7. If line 7 is: If line 7 is: If line 7 is: But not Decimal But not **Decimal But not Decimal** Over Over Over amount is over amount is over amount is over \$0 - 15,000\$25,000-27,000 .29 \$37,000 - 39,000.23 .28 .22 15,000 - 17,000.34 27,000 - 29,00039,000 - 41,000X .20 8 17,000 - 19,000.33 29,000-31,000 .27 41,000 - 43,000.21 19,000-21,000 .32 31,000 - 33,000.26 43,000-No limit .20 21,000-23,000 .31 33,000-35,000 .25 23,000-25,000 .30 35,000 - 37,000.24 9a Multiply line 6 by the decimal amount on line 8 319.

on Schedule 3 (Form 1040), line 2

c Add lines 9a and 9b and enter the result

10

If you paid 2022 expenses in 2023, complete Worksheet A in the instructions. Enter the amount from line 13 of the worksheet here. Otherwise, enter -0- on line 9b and go to line 9c

Credit for child and dependent care expenses. Enter the smaller of line 9c or line 10 here and

Tax liability limit. Enter the amount from the Credit Limit Worksheet in the instructions 10

9с

11

0.

319.

319.

SCHEDULE 8812 (Form 1040)

Credits for Qualifying Children and Other Dependents

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

2023

OMB No. 1545-0074

Attachment Sequence No. **47**

Department of the Treasury Internal Revenue Service

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

Name(s) shown on return

NAGAMANI KATTA & PRUDHVI MACHINENI 375-69-5235

Part I Child Tax Credit and Credit for Other Dependents

ı aı	Office Tax Oreatt and Oreatt for Other Dependents		
1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR	1	200,320.
2a	Enter income from Puerto Rico that you excluded		
b	Enter the amounts from lines 45 and 50 of your Form 2555		
c	Enter the amount from line 15 of your Form 4563		
d	Add lines 2a through 2c	2d	0.
3	Add lines 1 and 2d	3	200,320.
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		
	Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident		
_	alien. Also, do not include anyone you included on line 4.		
7	Multiply line 6 by \$500	7	
8	Add lines 5 and 7	8	4,000.
9	Enter the amount shown below for your filing status.		
	• Married filing jointly—\$400,000		
10	• All other filing statuses—\$200,000 \\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	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	4.0	
	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	4,000.
	No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lines 14 and 27.		
	Yes. Subtract line 11 from line 8. Enter the result.		
13	Enter the amount from Credit Limit Worksheet A	13	28,272.
14	Enter the smaller of line 12 or line 13. This is your child tax credit and credit for other dependents	14	4,000.
	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 **additional child tax credit** on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27 (also complete Schedule 3, line 11) before completing Part II-A.

BAA

Schedule 8812 (Form 1040) 2023

Part	II-A Additional Child Tax Credit for All Filers		
Cautio	on: If you file Form 2555, you cannot claim the additional child tax credit.		
15	Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line	27 .	
16a	Subtract line 14 from line 12. If zero, stop here; you cannot take the additional child tax credit. Skip Parts II-A		
	and II-B. Enter -0- on line 27	16a	0.
b	Number of qualifying children under 17 with the required social security number: x \$1,600.		
	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	
	TIP: The number of children you use for this line is the same as the number of children you used for line 4.		
17	Enter the smaller of line 16a or line 16b	17	
18a	Earned income (see instructions)		
b	Nontaxable combat pay (see instructions)		
19	Is the amount on line 18a more than \$2,500?		
	No. Leave line 19 blank and enter -0- on line 20.		
	Yes. Subtract \$2,500 from the amount on line 18a. Enter the result 19		
20	Multiply the amount on line 19 by 15% (0.15) and enter the result	20	
	Next. On line 16b, is the amount \$4,800 or more?		
	No. If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the		
	smaller of line 17 or line 20 on line 27.		
	Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27.		
	Otherwise, go to line 21.		
Part	II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Resident	s of F	uerto Rico
21	Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2,		
	boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If		
	your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, 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	1040 and 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27,		
	and Schedule 3 (Form 1040), line 11.		
	1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11.		
25	Subtract line 24 from line 23. If zero or less, enter -0	25	
26	Enter the larger of line 20 or line 25	26	
-0	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	
	, , , , , , , , , , , , , , , , , , , ,		

Form **8889**

Department of the Treasury

Internal Revenue Service

Health Savings Accounts (HSAs)

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

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

OMB No. 1545-0074

2023
Attachment
Sequence No. 52

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

NAGAMANI KATTA

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions. 375-69-5235

beioi	re you begin: Complete Form 6653, Archer MSAs and Long-Term Care insurance Contracts, in	requ	irea.
Part	HSA Contributions and Deduction. See the instructions before completing this part. If y and both you and your spouse each have separate HSAs, complete a separate Part I for		
1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2023. See instructions	☐ Se	lf-only ⊠ Family
2	HSA contributions you made for 2023 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2023. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions	2	0.
3	If you were under age 55 at the end of 2023 and, on the first day of every month during 2023, you were, or were considered, an eligible individual with the same coverage, enter \$3,850 (\$7,750 for family coverage). All others , see the instructions for the amount to enter	3	7,750.
4	Enter the amount you and your employer contributed to your Archer MSAs for 2023 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2023, also include any amount contributed to your spouse's Archer MSAs	4	0.
5	Subtract line 4 from line 3. If zero or less, enter -0	5	7,750.
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2023, see the instructions for the amount to enter	6	3,000.
7	If you were age 55 or older at the end of 2023, married, and you or your spouse had family coverage under an HDHP at any time during 2023, enter your additional contribution amount. See instructions.	7	
8	Add lines 6 and 7	8	3,000.
9	Employer contributions made to your HSAs for 2023		
10	Qualified HSA funding distributions		
11	Add lines 9 and 10	11	3,000.
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), Part II, line 13	13	0.
	Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.		
Part	II HSA Distributions. If you are filing jointly and both you and your spouse each have sepa	rate l	HSAs, complete
	a separate Part II for each spouse.		
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 any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions	4.415	
_		14b	
C	Subtract line 14b from line 14a	14c	
15	Qualified medical expenses paid using HSA distributions (see instructions)	15	
16	Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0 Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f	16	
17a	If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here		
	Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c	17b	
Part	Income and Additional Tax for Failure To Maintain HDHP Coverage. See the instructi completing this part. If you are filing jointly and both you and your spouse each have sep complete a separate Part III for each spouse.		
18	Last-month rule	18	
19	Qualified HSA funding distribution	19	
20	Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f .	20	
21	Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form		
	1040), Part II, line 17d	21	

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

(Rev. November 2023)

Department of the Treasury Internal Revenue Service

Taxpayer name(s) shown on return

Paid Preparer's Due Diligence Checklist

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

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

OMB No. 1545-0074 For tax year 20 23 Attachment

Sequence No. 70

Taxpayer identification number

NAGA	AMANI KATTA & PRUDHVI MACHINENI	375-69-523	5		
Preparer's name Preparer tax identified		ation numb	oer		
SYAN	M PRIYA RAM SAGAR GUPTA TALLAM	P02082703			
Part	Due Diligence Requirements				
	check the appropriate box for the credit(s) and/or HOH filing status claimed on the retubenefit(s) claimed (check all that apply).		the rel		arts I-V HOH
1	Did you complete the return based on information for the applicable tax year provided I or reasonably obtained by you?	by the taxpayer	Yes	No	N/A
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?				
3	Did you satisfy the knowledge requirement? To meet the knowledge requirement, you must do both or the following. Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's responses to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status.		X		
	• Review information to determine that the taxpayer is eligible to claim the credit(s) an status and to figure the amount(s) of any credit(s)		X		
4	Did any information provided by the taxpayer or a third party for use in preparing information reasonably known to you, appear to be incorrect, incomplete, or inconsis answer questions 4a and 4b. If " No ," go to question 5.)	tent? (If "Yes,"		×	
а	Did you make reasonable inquiries to determine the correct, complete, and consistent inf	ormation? .			
b	Did you contemporaneously document your inquiries? (Documentation should include you asked, whom you asked, when you asked, the information that was provided, and information had on your preparation of the return.)	the questions the impact the			
5	Did you satisfy the record retention requirement? To meet the record retention requirer keep a copy of your documentation referenced in question 4b, a copy of this Form 8867 applicable worksheet(s), a record of how, when, and from whom the information used to 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) processes that you relied on to determine eligibility for the credit(s) and/or HOH filling states.	, a copy of any prepare Form provided by the			
	the amount(s) of the credit(s) $\ldots \ldots \ldots \ldots \ldots \ldots \ldots$		×		
	List those documents provided by the taxpayer, if any, that you relied on:				
6	Did you ask the taxpayer whether he/she could provide documentation to substantiate credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return is selected for audit?	eturn if his/her	X		
7	Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous (If credits were disallowed or reduced, go to question 7a; if not, go to question 8.)		×		
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 correct Schedule C (Form 1040)?				

orm 8	867 (Rev. 11-2023)			Page 2		
Part	Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go	to Part	III.)			
9a		Yes	No	N/A		
	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.)					
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?					
_	has supported the child the entire year?					
C	more than one person (tiebreaker rules)?					
Part	1 (claim C	TC, A	CTC.		
	or ODC, go to Part IV.)		•	,		
10	Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is	Yes	No	N/A		
	a citizen, national, or resident of the United States?	×				
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?	×				
12	Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or					
	separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return?	×				
Part			 Part \	/\		
13	Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qu		Yes	No		
	tuition and related expenses for the claimed AOTC?			П		
Part	Due Diligence Questions for Claiming HOH (If the return does not claim HOH filing statu	s, go to	D Part	VI.)		
14	Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax	x year	Yes	No		
	and provided more than half of the cost of keeping up a home for the year for a qualifying person?					
Part	VI Eligibility Certification					
You will have complied with all due diligence requirements for claiming the applicable credit(s) and/or HOH filing on the return of the taxpayer identified above if you:						
	 A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's respo in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(status and to figure the amount(s) of the credit(s); 	nses on s) and/c	the ref or HOH	turn or filing		
	 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; 	ist for a	ny app	licable		
	C. Submit Form 8867 in the manner required; and					
	 D. Keep all five of the following records for 3 years from the latest of the dates specified in the Form 8867 instr Document Retention. 					
	1. A copy of this Form 8867.					
	2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.					
	3. Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).	"s eligib	ility for	the		
	A record of how, when, and from whom the information used to prepare this form and the applica obtained.	ble worl	ksheet(s) was		
	A record of any additional information you relied upon, including questions you asked and the tax determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount	payer's unt(s) of	respon the cre	ses, to edit(s).		
	If you have not complied with all due diligence requirements, you may have to pay a penalty for each related to a claim of an applicable credit or HOH filing status (see instructions for more information	h failur).	e to co	mply		
15	Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct	t. and	Yes	No		
	complete?		×			