#### 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.

Submission Identification Number (SID)

Taxpay	/er's name	Social securit	ty numb	ber
PRA	KASH REDDY PUTTA	044-81-	-3598	8
Spouse	o's name	Spouse's soc	ial secu	urity number
Par	t I Tax Return Information – Tax Year Ending December 31, 2023 (Ent	er year you a	ire au	thorizing.)
Enter	whole dollars only on lines 1 through 5.			
Note:	Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.			
1	Adjusted gross income		1	885,569.
2	Total tax		2	289,124.
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099		3	289,658.
4	Amount you want refunded to you		4	534.
5			5	

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

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	ERO firm name	to enter or generate my PIN	E
	La cable a stara			TTO	to out on a second of the DINI	11

1	3	5	9	8	
Ent don	er fiv i't en	ve dig ter a	gits, all ze	but ros	as my

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

Date 🕨

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

I authorize

to	enter	or	generate	my	PIN

as mv Enter five digits, but don't enter all zeros

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 Me	thod Returns Only—continue below
Part III Certification and Authentication – Pra	ctitioner PIN Method Only
ERO's EFIN/PIN. Enter your six-digit EFIN followed by yo	ur five-digit self-selected PIN. 2 2 2 4 9 6 0 8 2 7 1 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 signature >		Date 🕨	
ERO Must Retain This F Don't Submit This Form to the I			
For Paperwork Reduction Act Notice, see your tax return instructions.	BAA	REV 03/07/24 PRO	Form 8879 (Rev. 01-2021)

<b>1040</b>		artment of the Treasury—Internal Revenue Servi <b>S. Individual Income Tax</b>		turn	202	3	OMB No. 1545	-0074	IRS Use Only	–Do not v	/rite or sta	aple in this space.
For the year Jan	. 1-Dec	c. 31, 2023, or other tax year beginning			, 2023, en	ding			, 20	See se	parate	instructions.
Your first name	and m	iddle initial	Last r	name						Your so	cial sec	curity number
PRAKASH	RED	DY	PUT	TA						044	81	3598
		s first name and middle initial	Last r									security number
Home address	(numbe	er and street). If you have a P.O. box, see	instruc	ctions.				A	pt. no.	Preside	ntial Ele	ection Campaign
3230 161	TH A	VE W						7	05			ou, or your
City, town, or p	ost offi	ice. If you have a foreign address, also co	mplete	spaces be	elow.	Sta	ate	ZIP co	ode		•	jointly, want \$3 nd. Checking a
SEATTLE						WZ		981		box bel	ow will	not change
Foreign country	/ name			Foreign p	province/state	/count	ty	Foreig	n postal code	your ta:		
							<i>.</i> .				Yo	ou Spouse
Filing Status		Single					Head of he	buseh	old (HOH)			
Check only		Married filing jointly (even if only or Married filing concretely (MES)	ne nac	a income)				ouni	ing spouse	(088)		
one box.	L If y	Married filing separately (MFS) you checked the MFS box, enter the	name	ofvours	nouse If vo				• •	. ,	ild'e na	me if the
		alifying person is a child but not you										
Digital		ny time during 2023, did you: (a) rece						-		. ,		es 🛛 No
Assets		hange, or otherwise dispose of a diginetic adigination of a diginetic additional additiona Additional additional additional additional additional additional additional additional additional additional a					a dependent	1)? (36		115.)		
Standard Deduction	_	Spouse itemizes on a separate return	•		•		•					
		: Were born before January 2, 1		Are b			_	n hofe	ore January	2 1050		s blind
Dependents			939		•	ouse		14				(see instructions):
-		First name Last name		(2) :	Social securit number	У	(3) Relationsh to you	ip (.	Child tax c	-		or other dependents
lf more than four	(1)						,					
dependents,												$\Box$
see instructions and check	s ——											
here												
Income	1a	Total amount from Form(s) W-2, be	ox 1 (s	see instruc	ctions) .					. 1a	1	903,204.
Attach Form(s)	b	Household employee wages not re	eporte	d on Form	n(s) W-2.					. 1b	)	
W-2 here. Also	С	Tip income not reported on line 1a	Tip income not reported on line 1a (see instru							. 10	;	
attach Forms W-2G and	d	Medicaid waiver payments not rep		`	, (	instru	uctions)			. 10	-	
1099-R if tax	е	Taxable dependent care benefits f						• •		. 1e	-	
was withheld.	f	Employer-provided adoption bene						• •		. <u>1</u> f		
lf you did not get a Form	g	Wages from Form 8919, line 6 .				• •		• •	· · ·	. <u>1</u> g		0.
W-2, see	h i	Other earned income (see instructi Nontaxable combat pay election (s	,			• •	· · · · ·	· ·		. <u>1</u> h		0.
instructions.	z	Add lines 1a through 1h		siructions	)	• •	🔤 🛙			. 1z		903,204.
Attach Sch. B	 2a	Ŭ	2a		· · ·	 <b>b</b> Т	axable interest			. 12	-	1,961.
if required.	3a		3a		956.		Ordinary divider			. 3b		1,094.
	4a	-	4a				axable amount			. 4b	,	
Standard Deduction for –	5a	Pensions and annuities	5a			bТ	axable amount	t		. 5b		
Single or	6a	Social security benefits	6a			bΤ	axable amount	t		. 6b	)	
Married filing separately,	С	If you elect to use the lump-sum e	lectior	n method,	check here	(see	instructions)		[			
\$13,850 • Married filing	7	Capital gain or (loss). Attach Schee	dule D	if require	ed. If not req	uired	, check here		[	7	_	-3,000.
jointly or	8	Additional income from Schedule								. 8		-17,690.
Qualifying surviving spouse,	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,			our <b>total in</b>	com	e			. 9	_	885,569.
\$27,700 • Head of	10	Adjustments to income from Sche		-						. 10		0.05
household, \$20,800	11	Subtract line 10 from line 9. This is	-	-	-			• •	· · ·	. 11		885,569.
If you checked	12	Standard deduction or itemized						• •		. 12	_	13,850.
any box under Standard	13 14	Qualified business income deducti			995 or Forn	1 899	ъ-А	• •		. 13		12 050
Deduction, see instructions.	14 15	Add lines 12 and 13 Subtract line 14 from line 11. If zer			 _0_ This is :		· · · · ·	 		. <u>14</u> . 15		<u>13,858.</u> 871,711.
	10	Subtract line 14 Iron line 11. If Zer		ss, enter	-o 1118 IS	your		σ.		. 15	<u> </u>	0/1,/11.

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 an	ny from Form	(s): <b>1</b> 🗌 881	4 <b>2</b> 4972	3 🗌	[	16	282,702.
Credits	17	Amount from Schedule 2, line 3					[	17	
	18	Add lines 16 and 17					[	18	282,702.
	19	Child tax credit or credit for othe	er dependen	ts from Sched	ule 8812		[	19	
	20	Amount from Schedule 3, line 8					[	20	
	21	Add lines 19 and 20					[	21	
	22	Subtract line 21 from line 18. If z	zero or less,	enter -0			[	22	282,702.
	23	Other taxes, including self-empl	oyment tax,	from Schedule	2, line 21 .		[	23	6,422.
	24	Add lines 22 and 23. This is you	-				[	24	289,124.
Payments	25	Federal income tax withheld from							
i ajente	а	Form(s) W-2				<b>25a</b> 283	,236.		
	b	Form(s) 1099				25b			
	с	Other forms (see instructions)					,422.		
	d	Add lines 25a through 25c						25d	289,658.
If you have a	26	2023 estimated tax payments ar						26	
If you have a l qualifying child,	27	Earned income credit (EIC)				27			
attach Sch. EIC.	28	Additional child tax credit from So			-	28			
	29	American opportunity credit from				29			
	30	Reserved for future use		-		30			
	31	Amount from Schedule 3. line 1				31			
	32	Add lines 27, 28, 29, and 31. Th				-		32	
	33	Add lines 25d, 26, and 32. These		-	-		-	33	289,658.
Defund	34	If line 33 is more than line 24, su						34	534.
Refund	35a	Amount of line 34 you want refu				, ,		35a	534.
Direct deposit?	b b	Routing number 0 8 1 9			_			55a	551.
See instructions.	u b	Account number 2 9 1 0					Savings		
	36	· · · · · · · · · · · · · · · · · · ·							
A		Amount of line 34 you want app				36			
Amount You Owe	37	Subtract line 33 from line 24. Th For details on how to pay, go to						07	
Tou Owe	00					1 1	· · ·	37	
	38	Estimated tax penalty (see instru	,			38			
Third Party		you want to allow another pe			n with the IRS?		omplete be		× No
Designee		signee's		Phone			onal identific		
	na			no.			ber (PIN)	alion	
Sign	Un	der penalties of perjury, I declare that I	have examine	d this return and	accompanying sche	edules and statement	s, and to the	e best c	of my knowledge and
Here	be	ief, they are true, correct, and complete	e. Declaration	of preparer (othe	than taxpayer) is b	ased on all informatio	on of which p	orepare	er has any knowledge.
пеге	Yo	ur signature		Date	Your occupation		If the I	RS ser	nt you an Identity
					( :		N, enter it here		
Joint return?						WARE ENGINEER		,	
See instructions. Keep a copy for	Sp	ouse's signature. If a joint return, <b>both</b>	must sign.	Date	Spouse's occupat	tion			it your spouse an action PIN, enter it here
your records.							(see in		
	Ph	one no. (408)505-3229		Email address	סוויייז מעדי	M@GMAIL.COM			
		(	parer's signat		I UIIA.CHE	Date	PTIN		Check if:
Paid		M PRIYA RAM SAGAR GUPTA SY	1		אס מוזטייא		P02082	702	Self-employed
Preparer					INI GUPIA	01/01/2024			
Use Only		m's name GLOBAL TAXES			T 00016		Phone		678)965-9522
		m's address 245 ROONEY (		INSWICK NO			Firm's		84-3171965
GO TO WWW.Irs.go	ov/Forn	1040 for instructions and the latest in	formation.		BAA	REV 03/07/24 PRO			Form <b>1040</b> (2023)

SCHEDULE	1
(Form 1040)	

Department of the Treasury

# Additional Income and Adjustments to Income

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

OMB No. 1545-0074 20

Department of the Treasury Internal Revenue Service	Go to www.irs.gov/Form1040 for instructions and the latest information.		Attachment Sequence No. <b>01</b>
Name(s) shown on Fo	rm 1040, 1040-SR, or 1040-NR	Your soc	ial security number
PRAKASH REDDY	044-81	-3598	
	••		

Par	t 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	ach Schedule E .	5	-18,928.
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	_	
	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	- 1	
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 Nontaxable amount of Medicaid waiver payments included on Form	8r	-	
S	1040, line 1a or 1d	8s (		
	Pension or annuity from a nonqualifed deferred compensation plan or		4	
t	a nongovernmental section 457 plan	8t		
u	Wages earned while incarcerated	8u	-	
u z	Other income List type and amount:			
2	Other income. List type and amount:     1,238.	<b>8z</b> 1,238.		
9	Total other income. Add lines 8a through 8z		9	1,238.
10	Combine lines 1 through 7 and 9. This is your <b>additional income</b> . Ente	r here and on Form		1,200.
	1040, 1040-SR, or 1040-NR, line 8		10	-17,690.
East Da	norwork Reduction Act Nation son your tax return instructions			la 1 (Farma 1040) 0000

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

Schedule 1 (Form 1040) 2023

Par	t II Adjustments to Income			
11	Educator expenses		11	
12	Certain business expenses of reservists, performing artists, and fee-basis	s government		
	officials. Attach Form 2106		12	
13	Health savings account deduction. Attach Form 8889		13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903		14	
15	Deductible part of self-employment tax. Attach Schedule SE		15	
16	Self-employed SEP, SIMPLE, and qualified plans		16	
17	Self-employed health insurance deduction		17	
18	Penalty on early withdrawal of savings		18	
19a	Alimony paid		19a	
b	Recipient's SSN			
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:			
 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			
с	Nontaxable amount of the value of Olympic and Paralympic medals		-	
C	and USOC prize money reported on line 8m			
d			-	
	Repayment of supplemental unemployment benefits under the Trade		-	
е	Act of 1974			
			-	
f			-	
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	er here and on		
	Form 1040, 1040-SR, or 1040-NR, line 10	<u></u>	26	
	BAA REVO	)3/07/24 PRO	Schedule 1 (F	orm 1040) 202

SCHE	DULE	2
(Form	1040)	

## **Additional Taxes**

OMB No. 1545-0074

2

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

Department of the Treasury Internal Revenue Service Go to www.irs.gov/Form1040 for instructions and the latest information.							Attachment Sequence No. <b>02</b>
Name	e(s) shown on Fo	rm 1040, 1040-SR, or 1040-NR			Your so	cial	security number
PRA	KASH REDDY	PUTTA			044-8	1-3	598
Ра	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	and 2. Enter here and on Form 1040, 1040-SR, or 104	D-NF	R, line 1	7	3	
Pa	rt II Other	Taxes					
4	Self-employ	ment tax. Attach Schedule SE				4	
5		rity and Medicare tax on unreported tip income.	5				
6	Uncollected Form 8919	social security and Medicare tax on wages. Attach	6				

7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required.		
	If not required, check here $\ldots$	8	
9	Household employment taxes. Attach Schedule H	9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10	
11	Additional Medicare Tax. Attach Form 8959	11	6,422.
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	
	(00)	ontinu	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 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	6,42	2.
	ВАА	REV 03/07/24 PRO		ule 2 (Form 1040) 2	

## SCHEDULE B (Form 1040)

Department of the Treasury Internal Revenue Service

# Interest and Ordinary Dividends

OMB No. 1545-0074 9

## Attach to Form 1040 or 1040-SR.

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

Attachment Sequence No. 08 Your social security number Name(s) shown on return 044-81-3598 PRAKASH REDDY PUTTA Amount Part I List name of payer. If any interest is from a seller-financed mortgage and the 1 buyer used the property as a personal residence, see the instructions and list this Interest interest first. Also, show that buyer's social security number and address: (See instructions Robinhood Securities LLC 1,961. and the Instructions for Form 1040, line 2b.) Note: If you received a Form 1099-INT, 1 Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form. 2 1,961. 2 Excludable interest on series EE and I U.S. savings bonds issued after 1989. 3 3 4 Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b 4 1,961. Note: If line 4 is over \$1,500, you must complete Part III. Amount 5 List name of payer: <u>Moomoo Financial Inc.</u> 9 Part II 2. Fundrise Equity REIT,LLC Ordinary Fundrise Real Estate Interval Fund, LLC 0. Dividends Fundrise Income Real Estate Fund, LLC 40. (See instructions Robinhood Securities LLC 1,043. and the Instructions for Form 1040, 5 line 3b.) Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary 6 Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b 6 1,094. dividends shown on that form. Note: If line 6 is over \$1,500, you must complete Part III. Part III You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust. Foreign Accounts Yes No an

and Trusts	7a	At any time during 2023, did you have a financial interest in or signature authority over a financial	
<b>Caution:</b> If required, failure to file FinCEN Form		account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions	×
114 may result in substantial penalties.		If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements	
Additionally, you may be required to file Form 8938, Statement of	b	If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:	
Specified Foreign Financial Assets. See instructions.	8	During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions	×

REV 03/07/24 PRO

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

## 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.

20 Attachment Sequence No. 12

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

PRAKASH REDDY PUTTA

Your social security number 044-81-3598

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

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

See instructions for how to figure the amounts to enter on the lines below.		<b>(d)</b> Proceeds	(e) Cost	(g) Adjustments	s	(h) Gain or (loss) ubtract column (e)
	form may be easier to complete if you round off cents to e dollars.	(sales price)	(or other basis)	to gain or loss fror Form(s) 8949, Part line 2, column (g)	I, c	om column (d) and combine the result with column (g)
1a	Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.					
1b	Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked	10,080.	9,982.	26		124.
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 (I	oss) from Forms 4	684, 6781, and 88	324 <b>4</b>		
5	Net short-term gain or (loss) from partnerships, Schedule(s) K-1	usts from	;			
6	Short-term capital loss carryover. Enter the amount, if an <b>Worksheet</b> in the instructions	-	; (	278.)		
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back						-154.

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

See instructions for how to figure the amounts to enter on the lines below.		<b>(d)</b> Proceeds	<b>(e)</b> Cost	<b>(g)</b> Adjustmen to gain or loss		(h) Gain or (loss) Subtract column (e) from column (d) and
This who	form may be easier to complete if you round off cents to e dollars.	(sales price)	(or other basis)	Form(s) 8949, I line 2, colum	Part II,	combine the result with column (g)
8a	Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.					
8b	Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked	68,409.	74,809.			-6,400.
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.					
11	Gain from Form 4797, Part I; long-term gain from Forms from Forms 4684, 6781, and 8824	11				
12	Net long-term gain or (loss) from partnerships, S corporat	dule(s) K-1	12			
13	Capital gain distributions. See the instructions	13				
14	Long-term capital loss carryover. Enter the amount, if any <b>Worksheet</b> in the instructions	14	( 271.)			
15	15	-6,671.				

Part	III Summary	
16	Combine lines 7 and 15 and enter the result	<b>16</b> -6,825.
	• 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 03/07/24 PRO

Schedule D (Form 1040) 2023

Form **8949** 

# 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.



Department of the Treasury Internal Revenue Service Go to www.irs.gov/Form8949 for instructions and the latest information.

Name(s) shown on return	Social security number or taxpayer identification number
PRAKASH REDDY PUTTA	044-81-3598

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> (a) Description of property		(c) Date sold or	Proceeds	<b>(e)</b> Cost or other basis See the <b>Note</b> 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.		If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		<b>(h)</b> <b>Gain or (loss)</b> 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	<b>(g)</b> Amount of adjustment	from column (d) and combine the result with column (g).		
Moomoo Financial Inc.	01/01/23	12/31/23	10,080.	9,982.	W	26.	124.		
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).			10,080.	9,982.		26.	124.		

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

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

Form 8	49 (2023)	Attachment Sequence No.

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side PRAKASH REDDY PUTTA

Social security number or taxpayer identification number 044-81-3598

124

Page 2

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

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

**Note:** You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

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

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

<b>1</b> (a) Description of property	<b>(b)</b> Date acquired	(c) Date sold or	Proceeds S	<b>(e)</b> Cost or other basis See the <b>Note</b> below			(e) If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		<b>(h)</b> 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	<b>(g)</b> Amount of adjustment	from column (d) and combine the result with column (g).		
CHARLES SCHWAB & CO., INC.	01/01/22	12/31/23	52,000.	39,882.			12,118.		
Robinhood Securities LLC	01/01/22	12/31/23	16,409.	34,927.			-18,518.		
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 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked).			68,409.	74,809.			-6,400.		

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

REV 03/07/24 PRO

SCHEDULE	Ε
(Form 1040)	

## **Supplemental Income and Loss**

OMB No. 1545-0074

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

Department of the Treasury Internal Revenue Service

Attach to Form 1040, 1040-SR, 1040-NR, or 1041. Go to www.irs.gov/ScheduleE for instructions and the latest information.

c.)	2023
	Attachment Sequence No. <b>13</b>

Name(s)	shown on return						Your	social securi	ty number
PRAK	ASH REDDY PUTTA						044	4-81-359	8
Part	Income or Loss From Rental Real Estate Note: If you are in the business of renting personal pri- rental income or loss from Form 4835 on page 2, line	operty, use		<b>e C</b> . See	e instrue	ctions. If you	are an	individual, r	eport farm
Α	Did you make any payments in 2023 that would require	you to file	Form(s)	1099? S	See ins	structions .		🗆 `	Yes 🛛 No
B	f "Yes," did you or will you file required Form(s) 1099?							🗆 `	Yes 🗌 No
1a	Physical address of each property (street, city, state	, ZIP code	e)						
Α	KESHAVAPURI COLONY HASTINAPUR TELAN	CANA TH	, N 50005	79					
B		OANA II	J J0001						
1b	Type of Property (from list below) 2 For each rental real estate pr above, report the number of				Fa	ir Rental Days	Per	rsonal Use Days	QJV
Α	gersonal use days. Check the			Α		365		0	
B	if you meet the requirements			B		505			
C	qualified joint venture. See in	structions	5.	C					
	of Property:						1		
1	Single Family Residence 3 Vacation/Short-Term I	Rental	5 Lanc			Self-Rental			
2	Multi-Family Residence 4 Commercial		6 Roya	alties	8				
Incom				Α		Propert B	ies:		С
Incom 3	Rents received	3			16.	D			C
3 4		-		/	10.				
Exper	Royalties received	4							
5	Advertising	5							
6	Auto and travel (see instructions)								
7	Cleaning and maintenance			2,4	36				
8				2,4	30.				
о 9									
9 10	Insurance	-							
11	Management fees	-		1,8	25				
12	Mortgage interest paid to banks, etc. (see instruction			1,0	25.				
12	Other interest								
14				4,1	26				
15	Repairs    .    .    .    .    .    .      Supplies    .    .    .    .    .    .				87.				
16	Taxes			ч,0	07.				
17		-		3,8	97				
18	Depreciation expense or depletion			3,2					
19	Other (list)	19		5,2	/5.				
20	Total expenses. Add lines 5 through 19			19,6	44				
21	Subtract line 20 from line 3 (rents) and/or 4 (royalties)			±,0					
21	result is a (loss), see instructions to find out if you mu								
	file Form 6198			-18,9	28.				
22	Deductible rental real estate loss after limitation, if ar on <b>Form 8582</b> (see instructions)	ny,		18,92		(		)(	)
23a	Total of all amounts reported on line 3 for all rental pr				23a	x	71	6.	,
b	Total of all amounts reported on line 4 for all royalty p	•			23b				
c	Total of all amounts reported on line 12 for all propert	-			23c				
d	Total of all amounts reported on line 18 for all propert				23d		3,27	3.	
e	Total of all amounts reported on line 20 for all propert				23e		9,64		
24	<b>Income.</b> Add positive amounts shown on line 21. <b>Do</b>							24	
25	Losses. Add royalty losses from line 21 and rental real e				nter to	tal losses he		25 (	18,928.)
26	Total rental real estate and royalty income or (los								10,720. )
20	here. If Parts II, III, and IV, and line 40 on page 2 do	o not appl	ly to you,	also e	nter th	nis amount o	on		
	Schedule 1 (Form 1040), line 5. Otherwise, include the	is amount	t in the to	tal on li	ne 41	on page 2		26	-18,928.

-18,928.



Department of the Treasury

Internal Revenue Service Name(s) shown on return

## **Qualified Business Income Deduction**

Attach to your tax return.

Go to www.irs.gov/Form8995A for instructions and the latest information.

OMB No. 1545-2294 2 ()

Attachmen Sequence No. 55A Your taxpayer identification number

044-81-3598

PRAKASH REDDY PUTTA

Note: You can claim the qualified business income deduction only if you have qualified business income from a qualified trade or business, real estate investment trust dividends, publicly traded partnership income, or a domestic production activities deduction passed through from an agricultural or horticultural cooperative. See instructions.

Use this form if your taxable income, before your qualified business income deduction, is above \$182,100 (\$364,200 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

#### Trade, Business, or Aggregation Information Part I

Complete Schedules A, B, and/or C (Form 8995-A), as applicable, before starting Part I. Attach additional worksheets when needed. See instructions.

1	(a) Trade, business, or aggregation name	(b) Ch specified		(c) Check if aggregation	(d) Taxpayer identification number	<b>(e)</b> Check if patron
Α			]			
В			]			
с			]			
Part	Determine Your Adjusted Qualified Business	Income				
				Α	В	С
	Qualified business income from the trade, business, or aggre See instructions		2			
	Multiply line 2 by 20% (0.20). If your taxable income is \$1 or less (\$364,200 if married filing jointly), skip lines 4 thro and enter the amount from line 3 on line 13	ugh 12	3			
	Allocable share of W-2 wages from the trade, busine aggregation		4			
	Multiply line 4 by 50% (0.50)		5			
	Multiply line 4 by 25% (0.25)		6			
	Allocable share of the unadjusted basis immediately		7			
	acquisition (UBIA) of all qualified property		8			
	Add lines 6 and 8		9			
	Enter the greater of line 5 or line 9		10			
11	W-2 wage and UBIA of qualified property limitation. En					
	smaller of line 3 or line 10		11			
	Phased-in reduction. Enter the amount from line 26, if any .		12			
	Qualified business income deduction before patron rec Enter the greater of line 11 or line 12		13			
	Patron reduction. Enter the amount from Schedule D (Form 8 line 6, if any. See instructions		14			
	Qualified business income component. Subtract line 14 from		15			
	Total qualified business income component. Add all a reported on line 15		16			
Eor Driv	(any Act and Panorwork Peduction Act Notice, see constate in	structions	. –		 Га	8005-A (0000)

Privacy Act and Paperwork Reduction Act Notice, see separate instructions

Form **8995-A** (2023)

## Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$182,100 but not \$232,100 (\$364,200 and \$464,200 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

				Α	В		С
17	Enter the amounts from line 3	. 17					
18	Enter the amounts from line 10	18					
19	Subtract line 18 from line 17	19					
20	Taxable income before qualified business						
_•	income deduction						
21	Threshold. Enter \$182,100 (\$364,200 if						
	married filing jointly)						
22	Subtract line 21 from line 20						
23	Phase-in range. Enter \$50,000 (\$100,000 if						
	married filing jointly)						
24	Phase-in percentage. Divide line 22 by line 23 24	%					
25	Total phase-in reduction. Multiply line 19 by line 24	. 25					
26	Qualified business income after phase-in reduction. Subtract lin	ie 🗌					
	25 from line 17. Enter this amount here and on line 12, for th						
	corresponding trade or business	26					
Part	IV Determine Your Qualified Business Income Deduct	tion					
27	Total qualified business income component from all qua	alified	trades	5,			
	businesses, or aggregations. Enter the amount from line 16			27			
28	Qualified REIT dividends and publicly traded partnership (PT	P) inco	me c	or 🛛			
	(loss). See instructions			28	42.		
29	Qualified REIT dividends and PTP (loss) carryforward from prior y	ears .		<b>29</b> (	)		
30	Total qualified REIT dividends and PTP income. Combine lines			lf			
	less than zero, enter -0			30	42.		
31	REIT and PTP component. Multiply line 30 by 20% (0.20)			31	8.		
32	Qualified business income deduction before the income limitation					32	8.
33	Taxable income before qualified business income deduction .				871,719.		
34	Enter your net capital gain, if any, increased by any qualified of						
	instructions)				956.		
35	Subtract line 34 from line 33. If zero or less, enter -0					35	870,763
36	Income limitation. Multiply line 35 by 20% (0.20)					36	174,153.
37	Qualified business income deduction before the domestic pro- under section 199A(g). Enter the smaller of line 32 or line 36					37	8.
38	DPAD under section 199A(g) allocated from an agricultural or I more than line 33 minus line 37	horticu	tural o	cooperative. I	Don't enter	38	
39	Total qualified business income deduction. Add lines 37 and 38					39	8.
40	Total qualified REIT dividends and PTP (loss) carryforward. C	ombin	e lines	3 28 and 29.	If zero or		
	greater, enter -0	<u></u>		<u> </u>		40	( 0.
			BAA	REV 03/07/24 PR			orm <b>8995-A</b> (2023

Form **8959** Department of the Treasury

Internal Revenue Service

Name(s) shown on return

PRAKASH REDDY PUTTA

# **Additional Medicare Tax**

If any line does not apply to you, leave it blank. See separate instructions. Attach to Form 1040, 1040-SR, 1040-NR, or 1040-SS.

Go to www.irs.gov/Form8959 for instructions and the latest information.

OMB No. 1545-0074

044-81-3598

Your social security number

Part			1		
1	Medicare wages and tips from Form W-2, box 5. If you have more than one				
	Form W-2, enter the total of the amounts from box 5	1	913,518.		
2	Unreported tips from Form 4137, line 6	2			
3	Wages from Form 8919, line 6	3			
4	Add lines 1 through 3	4	913,518.		
5	Enter the following amount for your filing status:				
	Married filing jointly				
	Married filing separately				
	Single, Head of household, or Qualifying surviving spouse \$200,000	5	200,000.		
6	Subtract line 5 from line 4. If zero or less, enter -0			6	713,518.
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009).				C 100
Dort	Part II	•		7	6,422.
Part		1			
8	Self-employment income from Schedule SE (Form 1040), Part I, line 6. If you				
•	had a loss, enter -0	8			
9	Married filing jointly.				
	Married filing separately				
	Single, Head of household, or Qualifying surviving spouse \$200,000	9			
10	Enter the amount from line 4	10			
11	Subtract line 10 from line 9. If zero or less, enter -0	11		-	
12	Subtract line 11 from line 8. If zero or less, enter -0			12	
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (				
10	go to Part III			13	
Part					
14	Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14		-		
	(see instructions)	14			
15	Enter the following amount for your filing status:				
	Married filing jointly				
	Married filing separately				
	Single, Head of household, or Qualifying surviving spouse \$200,000	15			
16	Subtract line 15 from line 14. If zero or less, enter -0			16	
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply lin				
	Enter here and go to Part IV	•		17	
Part					
18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), li			10	<i>c</i> 100
Part	filers, see instructions), and go to Part V	•		18	6,422.
	Medicare tax withheld from Form W-2, box 6. If you have more than one Form				
19	W-2, enter the total of the amounts from box 6	19	19,668.		
20	Enter the amount from line 1	20	913,518.		
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax		<u> </u>		
21	withholding on Medicare wages	21	13,246.		
22	Subtract line 21 from line 19. If zero or less, enter -0 This is your Add	<u> </u>			
	withholding on Medicare wages			22	6,422.
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation	n fron	n Form W-2, box		
	14 (see instructions)			23	
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also inclu-				
	federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c	•			_
	see instructions)	•		24	6,422.
For Pa	perwork Reduction Act Notice, see your tax return instructions.		REV 03/07/24 PRO		Form <b>8959</b> (2023)

Form **896** 

Department of the Treasury

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

OMB No. 1545-2227 20

3

Attach to your tax return.

	The Treasury Attach to your tax return. Revenue Service Go to www.irs.gov/Form8960 for instructions and the late	st information.		A S	ttachment equence No. 72
Name(s	shown on your tax return		Your soci		curity number or EIN
	(ASH REDDY PUTTA		044-8		-
Part	<b>Investment Income</b> Section 6013(g) election (see instructions)		1		
	Section 6013(h) election (see instructions)				
	Regulations section 1.1411-10(g) election (see in	structions)			
1	Taxable interest (see instructions)			1	1,961.
2	Ordinary dividends (see instructions)			2	1,094.
3	Annuities (see instructions)			3	_,
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or				
	businesses, etc. (see instructions)	<b>4a</b> -18,	,928.		
b	Adjustment for net income or loss derived in the ordinary course of a non- section 1411 trade or business (see instructions)	4b			
С	Combine lines 4a and 4b		-	4c	-18,928.
5a	Net gain or loss from disposition of property (see instructions)	<b>5a</b> -3	,000.		
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b			
с	Adjustment from disposition of partnership interest or S corporation stock (see				
	instructions)	5c			
d	Combine lines 5a through 5c			5d	-3,000.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)		[	6	
7	Other modifications to investment income (see instructions)			7	17.
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7			8	-18,856.
Part	II Investment Expenses Allocable to Investment Income and Modif	cations			
9a	Investment interest expenses (see instructions)	9a			
b	State, local, and foreign income tax (see instructions)	9b			
с	Miscellaneous investment expenses (see instructions)	9c			
d	Add lines 9a, 9b, and 9c			9d	
10	Additional modifications (see instructions)			10	
11	Total deductions and modifications. Add lines 9d and 10			11	
Part	II Tax Computation				
12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, estates and trusts, complete lines 18a–21. If zero or less, enter -0			12	0.
40	Individuals:				
13	Modified adjusted gross income (see instructions)		<u>,569.</u>		
14	Threshold based on filing status (see instructions)		<u>,000.</u>		
15	Subtract line 14 from line 13. If zero or less, enter -0		,569.	10	0
16	Enter the smaller of line 12 or line 15			16	0.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). En				0
	on your tax return (see instructions)		· ·	17	0.
40-		10-			
18a	Net investment income (line 12 above)	18a			
b	Deductions for distributions of net investment income and charitable deductions (see instructions)	18b			
С	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-	18c			
19a	Adjusted gross income (see instructions)	19a			
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b			
с	Subtract line 19b from line 19a. If zero or less, enter -0	19c			
20	Enter the smaller of line 18c or line 19c			20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.	038). Enter here	e and		
	include on your tax return (see instructions)	<u></u>		21	
For Pa	perwork Reduction Act Notice, see your tax return instructions.				Form <b>8960</b> (2023)

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

BAA

**Continuation Statement** 

# Additional Information From 2023 Federal Tax Return

# Schedule 1: Additional Income and Adjustments to Income Other Income

Description	Amount
Substitute Payment from 1099-Misc	17.
Other Income from box 3 of 1099-Misc	1,221.
Total	1,238.