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



| 1040 | | artment of the Treasury-Internal Revenue Servi | | ırn 202 | 23 | OMB No. 1545- | -0074 | IRS Use | Only- | -Do not w | rite or sta | ple in this spa | ace. |
|----------------------------------|-------------|--|------------|---------------------------|--------------|------------------|--------|-------------|------------|-----------|-------------|-----------------------------|------------|
| For the year Ja | n. 1–Dec | c. 31, 2023, or other tax year beginning | | , 2023, | ending | | | , 20 | | See sep | oarate i | nstruction | ns. |
| Your first name | e and m | iddle initial | Last nan | ne | | | | | | Your so | cial sec | urity numb | er |
| VIGNESH | | | GIRI | DHARAN | | | | | | 697 | 27 | 8822 | |
| | spouse's | s first name and middle initial | Last nan | | | | | | | | | security nu | ımber |
| RITHANY | A | | LAKSI | HMANAN | | | | | | 392 | 57 | 5219 | |
| Home address | (numbe | er and street). If you have a P.O. box, see | instructio | ns. | | | Α. | Apt. no. | | | | ction Cam | paign |
| 4 COLON | IAL ' | VILLAGE | | | | | | | | | | ou, or your | |
| City, town, or | oost offi | ice. If you have a foreign address, also co | mplete sp | aces below. | Sta | ate | ZIP co | ode | | • | ٠. | jointly, war nd. Checkir | |
| SHELTON | | | | | C | Γ | 064 | 84 | | • | | not change | • |
| Foreign countr | y name | | F | oreign province/sta | ite/coun | ty | Foreig | ın postal c | ode | your tax | or refu | _ | oouse |
| Filing Status | s \square | Single | • | | | Head of ho | ouseh | old (HOI | ⊣) | | | | |
| Check only | _ | Married filing jointly (even if only o | ne had ir | ncome) | | | | | | | | | |
| one box. | | Married filing separately (MFS) | | | | ☐ Qualifying | surviv | ing spo | use (C | QSS) | | | |
| | If y | you checked the MFS box, enter the | name of | f your spouse. If | you che | ecked the HOH | or Q | SS box, | enter | the chi | ld's nar | ne if the | |
| | qu | ıalifying person is a child but not you | ır depen | dent: | | | | | | | | | |
| Digital | At a | ny time during 2023, did you: (a) rec | eive (as a | a reward, award. | or pavr | ment for proper | rtv or | services |): or (| b) sell. | | | |
| Assets | | nange, or otherwise dispose of a dig | | | | | | | | | | s 🗵 No | 0 |
| Standard | | neone can claim: You as a de | | <u> </u> | | a dependent | | | | | | | |
| Deduction | | Spouse itemizes on a separate retur | • | | | • | | | | | | | |
| A ma /Dlimalman | | . Nere have before leaven 2.1 | 050 |] Arablind 6 | `~ ~ · · · ~ | | n hafe | ara lanu | om / O | 1050 | | لمعالط | |
| | | : Were born before January 2, 1 | 959 _ | | Spouse | | 14 | | | | | s blind see instruct | tional: |
| Dependent | | instructions): First name Last name | | (2) Social secu number | ırity | (3) Relationshi | ip (4 | Child t | | | | r other depe | |
| If more than four | NII | | | 737-06-22 | 71 | • | | | X | | 0.00 | | |
| dependents, | | OHIRA VIGNESH | | 752-67-32 | | Son Daughter | | | X | | | 一一 | |
| see instruction | is AAI | VIGNESII | | 752 07 52 | - / - | Daugittei | | | | | | 一一 | |
| and check here [|] | | | | | | | | | | | - | |
| Income | 1a | Total amount from Form(s) W-2, b | ox 1 (see | instructions) . | | | | | | 1a | | 171,07 | 70. |
| | b | Household employee wages not re | ` | , | | | | | | 1b | | | |
| Attach Form(s) W-2 here. Also | С | Tip income not reported on line 1a | • | . , | | | | | | 1c | | | |
| attach Forms | d | Medicaid waiver payments not rep | • | , | e instru | uctions) | | | | 1d | | | |
| W-2G and 1099-R if tax | е | Taxable dependent care benefits f | | | | | | | | 1e | | | |
| was withheld. | f | Employer-provided adoption bene | fits from | Form 8839, line | 29 . | | | | | 1f | | | |
| If you did not | g | Wages from Form 8919, line 6 . | | | | | | | | 1g | | | |
| get a Form W-2, see | h | Other earned income (see instruct | ions) . | | | | | | | 1h | | | 0. |
| instructions. | i | Nontaxable combat pay election (s | see instru | uctions) | | 1i | | | | | | | |
| | z | Add lines 1a through 1h | | | | | | | | 1z | | 171,07 | |
| Attach Sch. B | 2a | Tax-exempt interest | 2a | | b T | axable interest | | | | 2b | | | 6. |
| if required. | 3a_ | Qualified dividends | 3a | 135. | b C | Ordinary divider | nds . | | | 3b | | 13 | 37. |
| Standard | 4a | IRA distributions | 4a | | | axable amount | | | | 4b | | | |
| Standard Deduction for— | 5a | Pensions and annuities | 5a | | | axable amount | | | | 5b | | | |
| Single or | 6a | , | 6a | | | axable amount | i | | · <u>·</u> | 6b | | | |
| Married filing separately, | С | If you elect to use the lump-sum e | | • | • | , | | | | | | | |
| \$13,850 Married filing | 7 | Capital gain or (loss). Attach Sche | | | | | | | . L | 7 | | 16,89 | |
| jointly or | 8 | Additional income from Schedule | | | | | | | | 8 | | -18,03 | |
| Qualifying surviving spouse, | 9 | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7 | | | incom | е | | | | 9 | | 170,07 | <u>/4.</u> |
| \$27,700 • Head of | 10 | Adjustments to income from Sche | | | | | | | | 10 | | | |
| household, \$20,800 | 11 | · | | | | | | 11 | | 170,07 | | | |
| If you checked | 12 | Standard deduction or itemized | | | | | | | | 12 | | 27,70 | <u> </u> |
| any box under Standard | 13 | Qualified business income deduct | | | | | | | | 13 | | | |
| Deduction, see instructions. | 14 | Add lines 12 and 13 | | | | | | | | 14 | | 27 , 70 | |
| coo modudiono. | 15 | Subtract line 1/1 from line 11 If zon | n or loca | ontor () This i | 0 1/01/1 | tavahla inaam | ^ | | | 15 | 1 | 1/1/2/12/ | / /1 |

| Form 1040 (202) | 3) | | | | | | | | Page Z | | |
|------------------------------------|-----|--|-------------------------|-------------------|---------------------|------------------------|-------------|--------------------------|---------------------------|--|--|
| Tax and | 16 | Tax (see instructions). Check | if any from Form | (s): 1 881 | 4 2 🗌 4972 | з 🗌 | | 16 | 21,928. | | |
| Credits | 17 | Amount from Schedule 2, lir | ne 3 | | | | | 17 | | | |
| | 18 | Add lines 16 and 17 | | | | | | 18 | 21,928. | | |
| | 19 | Child tax credit or credit for | other dependen | ts from Sched | ule 8812 | | | 19 | 4,000. | | |
| | 20 | Amount from Schedule 3, lir | ne 8 | | | | | 20 | | | |
| | 21 | Add lines 19 and 20 | | | | | | 21 | 4,000. | | |
| | 22 | Subtract line 21 from line 18 | 3. If zero or less, | enter -0 | | | | 22 | 17,928. | | |
| | 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 | 17,928. | | |
| Payments | 25 | Federal income tax withheld | I from: | | | | | | | | |
| | а | Form(s) W-2 | | | | 25a 17 | 7,084. | | | | |
| | b | Form(s) 1099 | | | | 25b | | | | | |
| | С | Other forms (see instruction | s) | | | 25c | | | | | |
| | d | Add lines 25a through 25c | | | | | | 25d | 17,084. | | |
| 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) | | | | 27 | | | | | |
| allacii Scii. Eic. | 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 | 17,084. | | |
| Refund | 34 | If line 33 is more than line 24 | 4, subtract line 2 | 4 from line 33. | This is the amoun | nt you overpaid | | 34 | | | |
| | 35a | Amount of line 34 you want | refunded to you | ı. If Form 8888 | is attached, chec | k here | | 35a | | | |
| Direct deposit? | b | Routing number X X X | | | | | Savings | | | | |
| See instructions. | d | Account number X X X | X X X X | X X X Z | X X X X | XX | | | | | |
| | 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 | 844. | | |
| | 38 | Estimated tax penalty (see in | _ | - | | 38 | | | | | |
| Third Party | | you want to allow another | | | | | | | | | |
| Designee | | , | • | | | | omplete l | below. | ⋈ No | | |
| · · | | esignee's | | Phone | | | onal identi | ification | | | |
| | | me | | no. | | | ber (PIN) | | | | |
| Sign | | der penalties of perjury, I declare t lief, they are true, correct, and com | | | , , , | | , | | , , | | |
| Here | | | , | Date | Your occupation | | | | nt you an Identity | | |
| | 10 | our signature | | Date | Your occupation | | I . | | IN, enter it here | | |
| Joint return? | | | | | IT EMPLOYE | E | | inst.) | | | |
| See instructions. | Sp | ouse's signature. If a joint return, | both must sign. | Date | Spouse's occupation | on | | | nt your spouse an | | |
| Keep a copy for your records. | | | | | | | I . | itity Proti inst.) | ection PIN, enter it here | | |
| , | | 400000000000000000000000000000000000000 | | | HOME MAKER | | (300 | 11131./ | | | |
| | | one no. (203) 300–172 | | Email address | VIGY5SEPT@ | | DTINI | | Chapk if: | | |
| Paid | | eparer's name | Preparer's signat | | OHDER ERTT. | Date | PTIN | 0700 | Check if: | | |
| Preparer | | M PRIYA RAM SAGAR GUPTA TALLAM | 1 | KAM SAGAR | GUPTA TALLAM | 02/20/2024 | P0208 | | Self-employed | | |
| Use Only | | m's name GLOBAL TA | | | T 00016 | | | Phone no. (678) 965-9522 | | | |
| | Fir | m's address 245 ROONE | Y CT E BRU | NSWICK N | SWICK NJ 08816 | | | | Firm'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

VIGNESH GIRIDHARAN & RITHANYA LAKSHMANAN

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 697-27-8822

| Taxable refunds, credits, or offsets of state and local income taxes | | 1 | |
|--|--|--|--|
| | | | |
| Date of original divorce or separation agreement (see instructions): | | | |
| Business income or (loss). Attach Schedule C | | 3 | |
| | | | |
| | | | -18,031 |
| Farm income or (loss). Attach Schedule F | | 6 | |
| Unemployment compensation | | 7 | |
| Other income: | | | |
| Net operating loss | 8a (|) | |
| Gambling | 8b | | |
| Cancellation of debt | 8c | | |
| Foreign earned income exclusion from Form 2555 | 8d (|) | |
| Income from Form 8853 | 8e | | |
| Income from Form 8889 | 8f | | |
| Alaska Permanent Fund dividends | 8g | | |
| Jury duty pay | 8h | | |
| | 8i | | |
| | 8j | | |
| 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 | | |
| | | | |
| | 8m | | |
| , | 8n | | |
| | 80 | | |
| | 8p | | |
| | | | |
| | 8r | | |
| | | | |
| | 8s (|) | |
| | | | |
| | 8t | | |
| | | | |
| Other income. List type and amount: | - | | |
| | 8z | | |
| | | 9 | |
| | Alimony received Date of original divorce or separation agreement (see instructions): Business income or (loss). Attach Schedule C Other gains or (losses). Attach Form 4797 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Farm income or (loss). Attach Schedule F Unemployment compensation Other income: Net operating loss Gambling Cancellation of debt Foreign earned income exclusion from Form 2555 Income from Form 8853 Income from Form 8889 Alaska Permanent Fund dividends Jury duty pay Prizes and awards Activity not engaged in for profit income Stock options 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 Olympic and Paralympic medals and USOC prize money (see instructions) Section 951A(a) inclusion (see instructions) Section 951A(a) inclusion (see instructions) Section 461(l) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Scholarship and fellowship grants not reported on Form W-2 Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d Pension or annuity from a nonqualifed deferred compensation plan or a nongovernmental section 457 plan Wages earned while incarcerated Other income. List type and amount: | Alimony received Date of original divorce or separation agreement (see instructions): Business income or (loss). Attach Schedule C Other gains or (losses). Attach Form 4797 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule Farm income or (loss). Attach Schedule F Unemployment compensation Other income: Net operating loss Gambling Cancellation of debt Foreign earned income exclusion from Form 2555 Bd (Income from Form 8853 Real (Income from Form 8853 Real (Income from Form 8853 Real (Income from Form 8869 Real (Incom | Alimony received Date of original divorce or separation agreement (see instructions): Business income or (loss). Attach Schedule C Other gains or (losses). Attach Form 4797 4 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E Farm income or (loss). Attach Schedule F Unemployment compensation Other income: Net operating loss Gambling Cancellation of debt Foreign earned income exclusion from Form 2555 Bad () Income from Form 8853 Income from Form 8889 Alaska Permanent Fund dividends Jury duty pay Bh Prizes and awards Activity not engaged in for profit income Stock options 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 Olympic and Paralympic medals and USOC prize money (see instructions) Section 951(a) inclusion (see instructions) Section 951(a) inclusion (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Taxable distributions from an ABLE account (see instructions) Section 461(f) excess business loss adjustment Section 461(f) excess business loss adjustment Section 461(f) excess business loss adjustment Section |

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

| Par | t II Adjustments to Income | | | |
|-----|---|------|----|-------|
| 11 | Educator expenses | | 11 | _ |
| 12 | Certain business expenses of reservists, performing artists, and fee-basis government | nent | | _ |
| | 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 | | 9a | _ |
| b | Recipient's SSN | | | |
| С | Date of original divorce or separation agreement (see instructions): | | | |
| 20 | IRA deduction | | 20 | _ |
| 21 | Student loan interest deduction | | 21 | _ |
| 22 | Reserved for future use | | 22 | |
| 23 | Archer MSA deduction | 🛂 | 23 | _ |
| 24 | Other adjustments: | | | |
| а | Jury duty pay (see instructions) | | | |
| b | Deductible expenses related to income reported on line 8l from the | | | |
| | rental of personal property engaged in for profit | | | |
| С | Nontaxable amount of the value of Olympic and Paralympic medals | | | |
| | and USOC prize money reported on line 8m | | | |
| d | Reforestation amortization and expenses | | | |
| е | Repayment of supplemental unemployment benefits under the Trade Act of 1974 | | | |
| f | Contributions to section 501(c)(18)(D) pension plans | | | |
| g | Contributions by certain chaplains to section 403(b) plans 24g | | | |
| _ | 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 here and | | | |
| | Form 1040, 1040-SR, or 1040-NR, line 10 | 1 | 26 | _ |

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**

| Intern | al Revenue Service | Go to www.irs.gov/ScheduleD fo | or instructions and | the latest informati | ion. | | 8 | Sequence No. 12 |
|--------|---|---|---------------------------|--------------------------|---------------|--------------------------------------|----------|--|
| Name | e(s) shown on return | | | | | | | ecurity number |
| | | IARAN & RITHANYA LAKSHMANAN | | | | | -27- | 8822 |
| | • | y investment(s) in a qualified opportunity 8949 and see its instructions for additiona | • | • | | No oss. | | |
| Pa | rt I Short-To | erm Capital Gains and Losses—Ge | nerally Assets I | Held One Year o | or Le | ss (se | e ins | tructions) |
| lines | below. | ow to figure the amounts to enter on the | (d) Proceeds | (e) Cost | to ga | (g) djustmen in or loss | from | (h) Gain or (loss) Subtract column (e) from column (d) and |
| who | form may be eas le dollars. | ier to complete if you round off cents to | (sales price) | (or other basis) | | s) 8949, 2, colum | | combine the result with column (g) |
| 1a | 1099-B for which which you have However, if you | ort-term transactions reported on Form h basis was reported to the IRS and for e no adjustments (see instructions), choose to report all these transactions eave this line blank and go to line 1b. | | | | | | |
| 1b | Totals for all tran | sactions reported on Form(s) 8949 with | 525 , 375. | 516,835. | | 9,2 | 261. | 17,801. |
| 2 | Totals for all tran | nsactions reported on Form(s) 8949 with | 10,472. | 10,707. | | | | -235. |
| 3 | | nsactions reported on Form(s) 8949 with | | | | | | |
| 4 | | from Form 6252 and short-term gain or (lo | oss) from Forms 4 | 684, 6781, and 88 | 24 | | 4 | |
| 5 | | gain or (loss) from partnerships, S | • | estates, and tr | usts | from | 5 | |
| 6 | Short-term capit Worksheet in th | al loss carryover. Enter the amount, if an e instructions | | - | - | over | 6 | (|
| 7 | Net short-term | capital gain or (loss). Combine lines 1a is or losses, go to Part II below. Otherwise | through 6 in colu | ımn (h). If you have | e any | | 7 | 17,566. |
| Pa | rt II Long-Te | erm Capital Gains and Losses—Ger | nerally Assets H | leld More Than | One | Year | (see i | instructions) |
| See | instructions for he below. | ow to figure the amounts to enter on the | (d) | (e) | Ad | (g) djustmen | ts | (h) Gain or (loss) Subtract column (e) |
| This | form may be eas le dollars. | ier to complete if you round off cents to | Proceeds (sales price) | Cost (or other basis) | Form(| in or loss s) 8949, l 2, colum | Part II, | from column (d) and combine the result with column (g) |
| 8a | 1099-B for whic | ng-term transactions reported on Form h basis was reported to the IRS and for e no adjustments (see instructions). | | | | | | |
| | However, if you | choose to report all these transactions eave this line blank and go to line 8b. | | | | | | |
| 8b | | sactions reported on Form(s) 8949 with | 0 001 | 11 010 | | 1 1 | 17 | 674 |
| 9 | | sactions reported on Form(s) 8949 with | 9,991. | 11,812. | | ⊥,⊥ | 47. | -674. |
| 10 | Totals for all tran | nsactions reported on Form(s) 8949 with | | | | | | |
| 11 | Gain from Form | 4797, Part I; long-term gain from Forms | | | | | | |
| 40 | | 4, 6781, and 8824 | | | | | 11 | |
| | | ain or (loss) from partnerships, S corporations. See the instructions. | | trusts from Sched | | | 12 | |
| | . • | al loss carryover. Enter the amount, if any | | | | | 0 | |
| | Worksheet in th | | , | | - | | 14 | (|

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

-674.

15

Schedule D (Form 1040) 2023 Page 2

Part III **Summary** 16 Combine lines 7 and 15 and enter the result 16 16,892. • 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), 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 X 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.

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.

OMB No. 1545-0074 Attachment

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

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

Sequence No. 12A Social security number or taxpayer identification number

VIGNESH GIRIDHARAN & RITHANYA LAKSHMANAN

697-27-8822

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

Part I

Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term transactions, see page 2.

Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box A. B. or C below. Check only one box. If more than one box applies for your short-term transactions. complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

| ★ (A) Short-term transactions★ (B) Short-term transactions★ (C) Short-term transactions | reported on | Form(s) 1099 | 9-B showing bas | | | | e) |
|--|--|--------------------------------|-------------------------------------|--|-------------------------------------|--------------------------------|---|
| 1 (a) Description of property | (b) Date acquired | (c) Date sold or | (d) | (e) Cost or other basis See the Note below | | | (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 | (g) Amount of adjustment | from column (d) and combine the result with column (g). |
| ROBINHOOD SECURITIES LLC | 01/01/23 | 12/31/23 | 515,645. | 506,769. | W | 9,261. | 18,137. |
| FIDELITY BROKERAGE SERVICES LLC | 01/01/23 | 12/31/23 | 1,000. | 931. | | | 69. |
| FIDELITY BROKERAGE SERVICES LLC | 01/01/23 | 12/31/23 | 1,000. | 931. | | | 69. |
| E*TRADE SECURITIES LLC | 01/01/23 | 12/31/23 | 7,730. | 8,204. | | | -474. |
| | | | | | | | |
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| | | | | | | | |
| 2 Totals. Add the amounts in columns negative amounts). Enter each tota Schedule D, line 1b (if Box A above above is checked), or line 3 (if Box (in the column)). | al here and inc is checked), lir | lude on your ne 2 (if Box B | 525,375. | 516,835. | | 9,261. | 17,801. |

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.

Form 8949 (2023) Attachment Sequence No. **12A** Page **2**

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side VIGNESH GIRIDHARAN & RITHANYA LAKSHMANAN

Social security number or taxpayer identification number 697-27-8822

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.

X (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 | | | | | | | | | | | | |
|---|-------------------|--------------------------------|-------------------------------------|--|---|---|---|--|--|--|--|--|
| (a) Description of property | (b) Date acquired | (c) Date sold or | (d) Proceeds | (e) Cost or other basis See the Note below | If you enter an enter a c See the sep | f any, to gain or loss amount in column (g), ode in column (f). parate 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 | (g) Amount of adjustment | from column (d) and combine the result with column (g). | | | | | |
| ROBINHOOD SECURITIES LLC | 01/01/23 | 12/31/23 | 8,242. | 9,342. | M | 1,147. | 47. | | | | | |
| E*TRADE SECURITIES LLC | 01/01/23 | 12/31/23 | 1,749. | 2,470. | | | -721. | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

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 (ff Box D above is checked), or line 10 (ff Box F above is checked). In 9 (ff Box F above is checked). In 11,812.

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.

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. 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

VIGNESH GIRIDHARAN & RITHANYA LAKSHMANAN

Social security number or taxpayer identification number

697-27-8822

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

Part I Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term transactions, see page 2.

Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box A. B. or C below. Check only one box. If more than one box applies for your short-term transactions. complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

| - | Short-term transactionsShort-term transactions | - | | - | sis wasn't report | ed to the IF | RS | |
|--------------|---|--|--------------------------------|-------------------------------------|--|-------------------------------------|--|---|
| 1 | (a) Description of property | (b) Date acquired | (c) Date sold or | (d) Proceeds | (e) Cost or other basis See the Note below | If you enter an enter a co | f any, to gain or loss amount in column (g), ode in column (f). arate 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 | (g) Amount of adjustment | from column (d) and combine the result with column (g). |
| E*TRA | DE SECURITIES LLC | 01/01/23 | 12/31/23 | 10,472. | 10,707. | | | -235. |
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| | | | | | | | | |
| nega Sche | Is. Add the amounts in column tive amounts). Enter each tot dule D, line 1b (if Box A above e is checked), or line 3 (if Box | al here and inc e is checked), lir | lude on your ne 2 (if Box B | 10,472. | 10,707. | | | -235. |

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.

Department of the Treasury Internal Revenue Service

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

Attachment Sequence No. 13

OMB No. 1545-0074

| Part | Income or Note: If you a rental income Did you make any p | Loss From Re | YA LAKSHMANAN ental Real Estate an of renting personal proper | | valtios | | | | 697-2 | 7-8822 | |
|------------|--|--------------------|--|----------|-----------|----------------|---------|-----------------|---------------|--------------------------|------------------|
| A [| Note: If you at rental income Did you make any p | re in the business | | | valtice | | | | | | |
| | | | 4835 on page 2, line 40. | ty, use | | c . See | instruc | tions. If you a | re an indiv | vidual, repo | ort farm |
| B I | f "Yes," did you or | | that would require you | | | | | | | | s 🛛 No |
| | | will you file requ | ired Form(s) 1099? . | | | | | | | . \(\subseteq \text{Ye} | s 🗌 No |
| 1a | Physical address | of each proper | y (street, city, state, ZII | ode | e) | | | | | | |
| A | | <u> </u> | Y PERUMBAKKAM TA | | <u> </u> | IN 60 | 0100 | | | | |
| <u></u> | F 403, KADIA | ANCE MERCUR | I PERUMDANNAM IA | | NADU 1 | LIN OU | 0100 | | | | |
| | | | | | | | | | | | |
| | Type of Property | 0 For each | rantal raal aatata araa | why lint | to d | | Foi | r Rental | Понови | al I la a | |
| ID | Type of Property (from list below) | 2 For each | rental real estate prope port the number of fair | rental | eu and | | _ | Days | Person Da | | QJV |
| A | 3 | | use days. Check the Q | | | Α | | 365 | | 0 | |
| B | 3 | if you me | et the requirements to t | file as | a | В | | 303 | | 0 | |
| | | qualified j | oint venture. See instru | ıctions | S. | C | | | | | |
| | │ of Property: | | | | | | | | | | |
| | Single Family Resid | dence 3 Va | cation/Short-Term Ren | tal | 5 Lanc | 1 | 7 | Self-Rental | | | |
| | Multi-Family Reside | | mmercial | tai | 6 Roya | | | Other (descr | ihe) | | |
| | ividiti-i airiliy riesidi | ence + oc | Tilliercial | | - O HOye | aities | | | | | |
| | | | | | | | | Propertie | es: | | |
| Incom | | | | | | Α | | В | | | С |
| 3 | | | | 3 | | 1,1 | 50. | | | | |
| 4 | | <u></u> | | 4 | | | | | | | |
| Expen | | | | | | | | | | | |
| 5 | | | | 5 | | | | | | | |
| 6 | | · | | 6 | | | | | | | |
| 7 | | | | 7 | | 2,9 | 80. | | | | |
| 8 | | | | 8 | | | | | | | |
| 9 | | | | 9 | | | | | | | |
| 10 | - | | | 10 | | | | | | | |
| 11 | - | | | 11 | | 2,9 | 50. | | | | |
| 12 | | - | etc. (see instructions) | 12 | | | | | | | |
| 13 | | | | 13 | | | | | | | |
| 14 | • | | | 14 | | | 70. | | | | |
| 15 | | | | 15 | | 3,1 | 10. | | | | |
| 16 | | | | 16 | | | | | | | |
| 17 | | | | 17 | | 2,9 | | | | | |
| 18 | | ense or depletior | 1 | 18 | | 3,5 | 81. | | | | |
| 19 | Other (list) | | | 19 | | | | | | | |
| 20 | | | gh 19 | 20 | | 19,1 | 81. | | | | |
| 21 | | | and/or 4 (royalties). If | | | | | | | | |
| | | | o find out if you must | 0.4 | | _10 ^ | 21 | | | | |
| 00 | | | | 21 | | -18,0 | 31. | | | | |
| 22 | | | after limitation, if any, | 00 | , | 10 00 | 1 1/ | | | , | , |
| 00- | • | | | 22 | (| 18,03 | | 1 | 1 = 0 | (| |
| 23a | | | ne 3 for all rental prope | | | | 23a | | , 150. | | |
| b | | | ne 4 for all royalty prop | | | • | 23b | | | | |
| C | | • | ne 12 for all properties | | | | 23c | າ | 501 | | |
| d | | | ne 18 for all properties | | | | 23d | | ,581. | | |
| e | | | ne 20 for all properties | | | | 23e | 19 | ,181. | | |
| 24 | • | | own on line 21. Do no t | | • | | | | . 24 | / 1 | 0 021 |
| 25 | • | • | e 21 and rental real estat | | | | | | | \ | .8 , 031. |
| 26 | | | alty income or (loss). ne 40 on page 2 do no | | | | | | | | |
| | | | herwise, include this a | | | | | | . 26 | _ | -18,031. |

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

VIGNESH GIRIDHARAN & RITHANYA LAKSHMANAN

697-27-8822

| VIGN | ESH GIRIDHARAN & RITHANYA LAKSHMANAN | 697- | 27-8 | 8822 |
|----------|--|--------|---------|----------|
| Pai | Child Tax Credit and Credit for Other Dependents | | | |
| 1 | Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR | | 1 | 170,074. |
| 2a | Enter income from Puerto Rico that you excluded | | | |
| b | Enter the amounts from lines 45 and 50 of your Form 2555 | 0. | | |
| c | Enter the amount from line 15 of your Form 4563 | | | |
| d | Add lines 2a through 2c | | 2d | 0. |
| 3 | Add lines 1 and 2d | | 3 | 170,074. |
| 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 | 0 | | |
| | Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resid | lent | | |
| | 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 | | | |
| 40 | • 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 | | 10 | _ |
| 11 | 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. | edit. | | |
| | Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. | | | |
| 13 | ★ Yes. Subtract line 11 from line 8. Enter the result. Enter the amount from Credit Limit Worksheet A | | 13 | 01 000 |
| 13 14 | Enter the amount from Credit Limit Worksheet A Enter the smaller of line 12 or line 13. This is your child tax credit and credit for other dependents | · L | 14 | 21,928. |
| 14 | Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19. | . [| 14 | 4,000. |
| | If the amount on line 12 is more than the amount on line 14, you may be able to take the addition | nal ab | ld to | z anadit |
| | on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-N | | | |
| | (also complete Schedule 3, line 11) before completing Part II-A. | K uno | ugii ii | ine 41 |
| | (also complete schedule 3, file 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. | | |
| Dank | Otherwise, go to line 21. | f D | t. Dian |
| | II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Resident | SOTP | 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 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13 . | | |
| 23 | Add lines 21 and 22 | - | |
| | 1040 and | - | |
| 24 | 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27, | | |
| | and Schedule 3 (Form 1040), line 11. | | |
| | 1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11. | | |
| 25 | Subtract line 24 from line 23. If zero or less, enter -0 | 25 | |
| 26 | Enter the larger of line 20 or line 25 | 26 | |
| | Next, enter the smaller of line 17 or line 26 on line 27. | | |
| 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

VIGNESH GIRIDHARAN

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions. 697-27-8822

Before you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required. HSA Contributions and Deduction. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse. Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2023. ☐ Self-only X Family 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, 2 0. If you were under age 55 at the end of 2023 and, on the first day of every month during 2023, you 3 were, or were considered, an eligible individual with the same coverage, enter \$3,850 (\$7,750 for 3 7,750. 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 4 0. 5 7,750. 5 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 7,750. If you were age 55 or older at the end of 2023, married, and you or your spouse had family coverage 7 under an HDHP at any time during 2023, enter your additional contribution amount. See instructions. 7 8 8 7,750. 9 Employer contributions made to your HSAs for 2023 10 2,300. 11 11 5,450. 12 12 HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13 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 separate HSAs, complete a separate Part II for each spouse. 1,997. 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 14b 14c 1,997. 15 15 1,997. Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this 16 16 0. If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% b Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form Part III Income and Additional Tax for Failure To Maintain HDHP Coverage. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse. 18 18 19 19 20 **Total income.** Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f 20 Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 21

(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

| VIG | WESH GIRIDHARAN & RITHANYA LAKSHMANAN | 697-27-8822 | 2 | | |
|--------|--|---|------------|-----|-----------------|
| repare | 's name | Preparer tax identifica | ition numb | oer | |
| | M PRIYA RAM SAGAR GUPTA TALLAM | P02082703 | | | |
| Part | • | | | | |
| | check the appropriate box for the credit(s) and/or HOH filing status claimed on the retubenefit(s) claimed (check all that apply). \square EIC \boxtimes CTC/AC | | the rel | | arts I-V HOH |
| 1 | Did you complete the return based on information for the applicable tax year provided ${\bf I}$ | by the taxpayer | Yes | No | N/A |
| | or reasonably obtained by you? | | × | | |
| 2 | If credits are claimed on the return, did you complete the applicable EIC and/or C worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Sched 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instructions worksheet(s) that provides the same information, and all related forms and schedules claimed? | ule 8812 (Form s, or your own | X | | |
| 3 | Did you satisfy the knowledge requirement? To meet the knowledge requirement, you nathe following. | nust do both of | | | |
| | • Interview the taxpayer, ask questions, and contemporaneously document the taxpayer determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status. | 's responses to | | | |
| | • 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) ptaxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing states the present (s) of the property (s). | , a copy of any prepare Form provided by the tus or to figure | | | |
| | the amount(s) of the credit(s) | | × | | |
| | List those documents provided by the taxpayer, if any, that you relied on: | | | | |
| 6 | Did you ask the taxpayer whether he/she could provide documentation to substantiate credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return is selected for audit? | 0 , | × | | |
| 7 | Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous | vear? | X | | |
| | (If credits were disallowed or reduced, go to question 7a; if not, go to question 8.) | , | | | |
| а | Did you complete the required recertification Form 8862? | | | | |
| 8 | If the taxpayer is reporting self-employment income, did you ask questions to prepare a | a complete and | | | |
| | correct Schedule C (Form 1040)? | | | | |

| orm 88 | 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 | Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.) | Yes | No | N/A |
| b | has supported the child the entire year? | | | |
| С | Did you explain to the taxpayer the rules about claiming the EIC when a child is the qualifying child of more than one person (tiebreaker rules)? | | | |
| Part | | claim C | CTC, A | CTC, |
| 10 | Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is a citizen, national, or resident of the United States? | Yes | No | N/A |
| 11 | Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child? | × | | |
| 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 quatuition and related expenses for the claimed AOTC? | alified | Yes | No |
| Part | | | Part ' | VI.) |
| 14 | Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax and provided more than half of the cost of keeping up a home for the year for a qualifying person? | | Yes | No |
| Part | VI Eligibility Certification | | | |
| | You will have complied with all due diligence requirements for claiming the applicable credit(s) and on the return of the taxpayer identified above if you: | or HO | l filing | status |
| | A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's respoint 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 ret or HOH | urn or filing |
| | B. Complete this Form 8867 truthfully and accurately and complete the actions described in this checkled credit(s) claimed and HOH filing status, if claimed; | 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 880 Document Retention. | 37 instru | uctions | under |
| | 1. A copy of this Form 8867. | | | |
| | 2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed. | | | |
| | Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s). | 's eligib | ility for | the |
| | A record of how, when, and from whom the information used to prepare this form and the applical obtained. | ble work | ksheet(| s) was |
| | 5. A record of any additional information you relied upon, including questions you asked and the taxle determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount of the taxles of the credit o | cayer's int(s) of | respon the cre | ses, to dit(s). |
| | If you have not complied with all due diligence requirements, you may have to pay a penalty for eac related to a claim of an applicable credit or HOH filing status (see instructions for more information | h failur). | e to co | mply |
| 15 | Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct complete? | | Yes | No |

Form CT-1040 Required Fields

The following fields are required to be automatically populated or completed for taxpayers to continue filing, or must be completed in response to the selection of other fields.

Required to be Automatically-Populated Fields

Each page of each form submitted to DRS must include the following automatically populated fields:

- 1. **Document Identification Numbers** Three occurrences of the Document Identification Number (DIN) must be on each page. The QR Code and two DINs must be on each scannable page. (See Document Identification Number and Quick Reference (QR) Code, on Page 4.)
- 2. **Social Security Number -** The Social Security Number must appear at the top of Form CT-1040, Pages 2, 3, and 4.
- 3. In addition, the following **Checklist for filing your Connecticut income tax return** must be included when hard copies of the form are printed. Taxpayers should not send the checklist to DRS with the return.

Do not send this sheet with your return.

Checklist for filing your Connecticut income tax return:

- 1. Be sure that Page 1 of your return is not printed on the back of this sheet.
- 2. Do not send "Draft" or "Unapproved" versions of your return. This will delay or stop the processing of your return.
- 3. Do not make manual (hand written or typed) corrections to your return; this is a machine readable return. Changes may only be made by reentering information in your software and re-printing the return.
- 4. Do not attach or send copies of forms W-2 or 1099.
- 5. Verify that the address lines on the return are correct and proper abbreviations are used.
- 6. If the Employer or Payer's Federal ID # is not listed on Page 2, Lines 18a through 18e, Column A, **all** withholding claimed will be disallowed and your return will not be successfully processed.
- 7. Do not attempt to remove or modify the solid boxes that print out on your return. Altering target marks may affect the processing of your return.
- 8. Do not use this return to change or amend previously filed returns. You must use Form CT-1040X to change or amend a previously filed Connecticut income tax return.
- Send all completed pages of CT-1040, Schedule CT-EITC, Schedule CT-CHET, Supplemental Schedule CT-1040WH, Schedule CT-IT Credit, Schedule CT-PE, Schedule CT-Dependent, and Form CT-6251. Send all four pages of your completed return, both pages of your completed CT-EITC schedule, the completed Schedule CT-CHET, and any other supporting schedules.
- 10. Make check payable to: Commissioner of Revenue Services
- 11. To ensure proper posting, write your SSN(s) (optional) and "2022 Form CT-1040" on your check.
- 12. To mail your return, use the following addresses:

For all tax returns with payment:

Department of Revenue Services

PO Box 2977

Hartford CT 06104-2977

For refunds and tax returns without payment:

Department of Revenue Services

PO Box 2976

Hartford CT 06104-2976

- 13. Verify that all fields print completely and any preparer information is filled out and legible before filing this return. If you find any errors, do not make manual changes. Re-enter information in your software and re-print the return.
- 14. If you wish to directly deposit a refund into a checking or savings bank account, confirm that Lines 25a through 25d have been completed. You **must** enter bank information on both the federal and Connecticut returns for each to be correctly deposited. Alpha characters are not allowed in Routing or Account Number fields.
- 15. When making payment using Form CT-1040V, **DO NOT** attach copies of your previously filed Form CT-1040.

Do not send this sheet with your return.

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Form CT-1040 - 2023

Connecticut Resident Income Tax Return (Rev. 12/23)

Page 1 of 4

Other tax year, beginning: and ending:

N S Y FJ N MFS N HOH N QSS

697 - 27 - 8822 392 - 57 - 5219

VIGNESH GIRIDHARAN N Dec.

RITHANYA LAKSHMANAN N Dec.

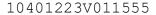
4 COLONIAL VLG N CT-8379 N CT-2210 N CT-19IT

USA N CT-1040 CRC N Federal Y Schedule Form 1310 CT-Dependent

SHELTON CT 06484 -

| 1. Federal adjusted gross income (from federal Form 1040, Line 11, or federal Form 1040-SR, Line 1 | 1) 1. | 170074 |
|---|---------|--------|
| 2. Additions to federal adjusted gross income (from Schedule 1, Line 38) | 2. | 0 |
| 3. Add Line 1 and Line 2 | 3. | 170074 |
| 4. Subtractions from federal adjusted gross income (from Schedule 1, Line 50) | 4. | 0 |
| 5. Connecticut adjusted gross income: Line 4 subtracted from Line 3. | 5. | 170074 |
| 6. Income tax | 6. | 8854 |
| 7. Credit for income taxes paid to qualifying jurisdictions (from Schedule 2, Line 59) | 7. | 0 |
| 8. Line 7 subtracted from Line 6. If Line 7 is greater than Line 6, "0" is entered. | 8. | 8854 |
| 9. Connecticut alternative minimum tax (from Form CT-6251) | 9. | 0 |
| 10. Add Line 8 and Line 9. | 10. | 8854 |
| 11. Credit for property taxes paid on your primary residence, motor vehicle, or both (from Schedule 3, Line | 68) 11. | 0 |
| 12. Line 11 subtracted from Line 10. If less than zero, "0" is entered. | 12. | 8854 |
| 13. Total allowable credits (from Schedule CT-IT Credit, Part 1, Line 11) | 13. | 0 |
| 14. Connecticut income tax: Line 13 subtracted from Line 12. If less than zero, "0" is entered. | 14. | 8854 |
| 15. Individual use tax (from Schedule 4, Line 69). If no tax is due, "0" is entered. | 15. | 0 |
| 16. Total tax: Add Line 14 and Line 15. | 16. | 8854 |





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Col. C - CT Income Tax Withheld

17. Amount from Line 16

Col. A - Employer or Payer's Fed. ID #

17.

8854

| Forms W-2, W-2G, a | and 1099 | Information |
|--------------------|----------|-------------|
|--------------------|----------|-------------|

| 18a. 18b. | 77 - 0510487 06 - 1489965 | • | 169669 1271 | 9045 4 |
|--------------|------------------------------|---|----------------|-----------|
| 18c. | - | • | 0 | 0 |
| 18d. | - | • | 0 | 0 |
| 18e. | - | • | 0 | 0 |

Col. B - CT Wages, Tips, etc.

18f. Additional Connecticut withholding (from Supplemental Schedule CT-1040WH, Line 3) 18f. 0

| 18. Total Connecticut income tax withheld: Amounts in Column C. | 18. | 9049 |
|---|--------------|------|
| 19. All 2023 estimated tax payments and any overpayments applied from a prior year | 19. | 0 |
| 20. Payments made with Form CT-1040 EXT | 20. | 0 |
| 20a. Earned income tax credit (from Schedule CT-EITC, Line 16). | 20a. | 0 |
| 20b. Claim of right credit (from Form CT-1040 CRC, Line 6). | 20b. | 0 |
| 20c. Pass-through entity tax credit: (from Schedule CT-PE, Line 1). Schedule must be attached. | 20c. | 0 |
| 21. Total payments and refundable credits: Add Lines 18, 19, 20, 20a, 20b and 20c. | 21. | 9049 |
| 22. Overpayment: If Line 21 is more than Line 17, Line 17 subtracted from Line 21. | 22. | 195 |
| 23. Amount of Line 22 you want applied to your 2024 estimated tax | 23. | 0 |
| 24. Amount of Line 22 you want applied as a CHET contribution (from Schedule CT-CHET, Line 4) | 24. | 0 |
| 24a. Total contributions of refund to designated charities (from Schedule 5, Line 70) | 24a. | 0 |
| 25. Refund: Lines 23, 24, and 24a subtracted from Line 22. If you have not elected to direct deposit, a refund check will be issued and processing may be | 25. delayed. | 195 |

25b. Rout. # 25c. Acct. #

021100361 25a. Acct. type Ck. Ν 277583701

25d. Refund going to a bank account outside the U.S. 25d. N

| 26. Tax due: If Line 17 is more than Line 21, Line 21 subtracted from Line 17. | 26. | 0 |
|---|-----|------|
| 27. If late: Penalty entered. Line 26 multiplied by 10% (.10). | 27. | 0 |
| 28. If late: Interest entered. | | |
| Line 26 multiplied by number of months or fraction of a month late, then by 1% (.01). | 28. | 0 |
| 29. Interest on underpayment of estimated tax (from Form CT-2210) | 29. | 0 |
| 30. Total amount due: Add Lines 26 through 29. | 30. | 0.00 |

Declaration: I declare under penalty of law that I have examined this return and all accompanying schedules and statements, including reporting and payment of any use tax due, and, to the best of my knowledge and belief, it is true, complete, and correct. I understand the penalty for willfully delivering a false return or document to DRS is a fine of not more than \$5,000, or imprisonment for not more than five years, or both. The declaration of a paid preparer other than the taxpayer is based on all information of which the preparer has any knowledge.

| Your signature | Date | Home/cell telephone number | |
|--|-----------|----------------------------|----------------------|
| • | • | 2033001726 | |
| Spouse's signature (if joint return) | Date | Daytime telephone number | |
| • | | • | • |
| Paid preparer's signature | Date | Telephone number | Paid Preparer's PTIN |
| •SYAM PRIYA RAM SAGAR GUPT | •022024 | • 6789659522 | P02082703 |
| Paid preparer's name | | | FEIN |
| SYAM PRIYA RAM SAGAR GUPT | 'A TAL | | 843171965 |
| Firm's name, address and ZIP code GLOBAL TAXES | LLC | | Self-employed |
| | BRUNSWI N | J 08816 - | N |

Third Party Designee - Complete the following to authorize DRS to contact another person about this return.

| Designee's n | name | • | | Telephone number | · . | Personal identification number (PIN) |
|--------------|------|---|--|------------------|-----|--------------------------------------|
| • | | | | • | | • |

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• 697278822

| Schedule 1 - Modifications to Federal Adjusted Gross Income | | | |
|--|---------------|-----------------------------|--------|
| 31. Interest on state and local government obligations other than Connect | | 3 | 31. 0 |
| 32. Mutual fund exempt-interest dividends from non-Connecticut state or i | | | , i. |
| obligations | | 32. | |
| 33. Taxable amount of lump-sum distributions from qualified plans not incl | uded in fe | deral adjusted | v |
| gross income | | • | 33. |
| 34. Beneficiary's share of Connecticut fiduciary adjustment: Entered only | if greater th | han zero. 3 | 34. 0 |
| 35. Loss on sale of Connecticut state and local government bonds | | | 35. 0 |
| 36. Section 168(k) federal bonus depreciation deduction allowed for property | placed in s | service during this year. 3 | 6. 0 |
| 36a. 80% of Section 179 federal deduction. | | 36 | 6a. 0 |
| 37. Other - specify ● | | 3 | 37. |
| 38. Total additions: Add Lines 31 through 37. | | 3 | 88. |
| 39. Interest on U.S. government obligations | | 3 | 9. 0 |
| 40. Exempt dividends from certain qualifying mutual funds derived from U | .S. govern | ment obligations 4 | 0. 0 |
| 41. Social Security benefit adjustment (from Social Security Benefit Adjust | ment Worl | ksheet) 4 | 1. 0 |
| 42. Refunds of state and local income taxes | | 4 | 2. 0 |
| 43. Tier 1 and Tier 2 railroad retirement benefits and supplemental annuiti | es | 4 | 3. 0 |
| 44. Military retirement pay | | 4 | 4. 0 |
| 45. 50% of income received from Connecticut Teachers' Retirement Syste | ·m | 4 | 5. 0 |
| 46. Beneficiary's share of Connecticut fiduciary adjustment: Entered only | if less than | zero. 4 | 6. 0 |
| 47. Gain on sale of Connecticut state and local government bonds | | 4 | 7. 0 |
| 48. CHET contributions made in 2023 or | | | _ |
| an excess carried forward from a prior year Acct. #: | | 4 | 8. 0 |
| 48a. 25% of Section 168(k) federal bonus depreciation deduction added ba | ack in prec | eding four vears. 48 | a. 0 |
| 48b. 100% of pension or annuity income. | | 48 | _ |
| 48c. Ordinary and necessary business expenses for taxpayers licensed und | er Chapter | | |
| are not claimed for federal income tax purposes. | · | 48 | 8c. 0 |
| 49. Other - specify ● | | 4 | 9. 0 |
| 50. Total subtractions: Add Lines 39 through 49. | | 5 | 0. 0 |
| Schedule 2 - Credit for Income Taxes Paid to Qualifying Jurisdictions | S | | |
| 51. Modified Connecticut adjusted gross income | | 5 | 51. 0 |
| | | Col. A | Col. B |
| 52. Qualifying jurisdiction's name and two-letter code 52. | | | |
| | | | |
| 53. Non-Connecticut income included on Line 51 and reported on a | 50 | 0 | 0 |
| qualifying jurisdiction's income tax return (from Schedule 2 worksheet) | 53. | 0 | 0 |
| 54. Line 53 divided by Line 51 | 54. | 0.0000 | 0.0000 |
| | | | |
| 55. Income tax liability: Line 11 subtracted from Line 6. | 55. | 0 | 0 |
| 56. Line 54 multiplied by Line 55 | 56. | 0 | 0 |
| • | | | |
| 57. Income tax paid to a qualifying jurisdiction | 57. | 0 | 0 |
| 58. Lesser of Line 56 or Line 57 | 58. | 0 | 0 |
| | | | . ^ |
| 59. Total credit: Add Line 58, all columns. | | 59 | 9. 0 |
| | | | |

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Form CT-1040, Page 4 of 4





• 697278822

Schedule 3 - Property Tax Credit

| Qualifying Property Name of Connecticut Tax Town or District Description of Property Date(s) Paid | Primary Residence SHELTON 4 COLONIA 01012023 | Auto 1 | Auto 2 |
|--|---|------------------------|--------|
| Amount Paid | 60. 2507 61. | 0 62. | 0 |
| 63. Total property tax paid: Add Lines 60, | 61, and 62. | 63. | 2507 |
| 64. Maximum property tax credit allowed | | 64. ● | |
| 65. Lesser of Line 63 or Line 64. | | 65. ● | 300 |
| 66. Property tax credit limitation decimal am | ount: If zero, the amount from Line 65 is ente | ered on Line 68. 66. • | 1.00 |
| 67. Line 65 multiplied by Line 66. | | 67. ● | 300 |
| 68. Line 67 subtracted from Line 65. | | 68. | 0 |
| Schedule 4 - Individual Use Tax | | | |
| 69a. Use tax at 1% (from Connecticut Indi | vidual Use Tax Worksheet, Section A, Colum | nn 7) 69a. | 0 |
| 69b. Use tax at 6.35% (from Connecticut I | ndividual Use Tax Worksheet, Section B, Co | olumn 7) 69b. | 0 |
| 69c. Use tax at 7.75% (from Connecticut I | olumn 7) 69c. | 0 | |
| 69d. Use tax at 2.99% (from Connecticut I | ndividual Use Tax Worksheet, Section D, Co | olumn 7) 69d. | 0 |
| 69. Individual use tax: Add Lines 69a, 69 | | 69. ● | 0 |
| Schedule 5 - Contributions to Designate 70a. AR | ed Charities | 70a. | 0 |
| 70b. OT | | 70b. | 0 |
| 70c. ES/W | | 70c. | 0 |
| 70d. BCR | | 70d. | 0 |
| 70e. SNS | | 70e. | 0 |
| 70f. MR | | 70f. | 0 |
| 70g. CBS | | 70g. | 0 |
| 70h. MHCIA | | 70h. | 0 |
| 70. Total Contributions: Add Lines 70a Taxpayer email | through 70h. | 70. | 0 |

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Schedule CT-Dependent

REV 01/29/24 PRO

Connecticut Resident Dependent Information (Rev. 12/23)

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Did you claim at least one dependent on your 2023 federal Form 1040?

▼ Y

2. Please provide the following information for each dependent that you claimed on the 2023 federal Form 1040 that you filed with the Internal Revenue Service (IRS). If you claimed more than four dependents, include a statement showing the information required in Columns A through D.

| A Dependent's Full Name | B Dependent's Date of Birth | C Dependent's Social Security Number | D Relationship of Dependent to You (See below for relationship codes.) |
|---|--|---|--|
| First name ► NIRAV Last name ► VIGNESH | ▶ 03292017 | ► 737062271 | ▶ 1 |
| First name ► AADHIRA Last name ► VIGNESH | ▶ 04052021 | ► 752673272 | ▶ 1 |
| First name Last name | > | > | > |
| First name Last name | • | • | • |

Total number of dependents: ► 2

Column D Relationship Codes

- 1 = son/daughter/stepchild
- 2 = niece/nephew
- 3 = grandchild
- 4 = foster child
- 5 = other



DEP1223V011555