1. Form 1040:
   1. 4a: IRA distributions: why is it $0. I transferred $6500 to traditional IRA. Then from traditional IRA to Roth IRA. Taxable amount = $0 is correct.
   2. 16: How is the Tax $62,346 calculated.
   3. 25b: Federal income tax withheld from Form(s) 1099 should be $4.
      1. PNC NATIONAL
      2. BOX 1: $16.36
      3. BOX 4: $3.87
      4. Payer's Federal Identification Number: 22-1146430
   4. Preparer’s signature: why does it say Self-prepared?
2. Form 2441:
   1. Part II – why is the amount $890 in (d) when its only $340 in Part 1.
   2. Can we add “Neighbors, 2825 WINDY HILL RD SE MARIETTA, GA 30067” Amount paid: $550. Add notes “THE PROVIDER HAS MOVED AND I AM UNABLE TO FIND THE PROVIDER TO GET THE
      1. TIN”
   3. Part II, line 10: how is tax liability limit $62,346 calculated
3. SCHEDULE 3:
   1. Line 1: Foreign tax credit should be $18.15. It is added in Schedule A line 6. Should it be in Schedule A or Schedule 3?

1. Schedule A:
   1. Line 11. Please split it up else will need to submit receipts if more than $250. Gifts by cash: $214, and other than cash or check: $400.
2. Form 8949:
   1. 1(a): Please put “TD Ameritrade Clearing, Inc.”
   2. Do we need to include code “M” in (f)?
3. Schedule 8812:
   1. Line 13: What is Credit limit worksheet A = $62,168. How is it calculated.
4. Form 8606:
   1. I believe Line 2 should be $12,000
   2. Line 8 should be $6,500
   3. Line 13 should be $6,500
   4. Line 16 should be $6,500
   5. Line 17 should be $6,500
5. Form 4952:
   1. 4a: $1,451 – how is it calculated.
   2. 4g: Shouldn’t it be $276?
6. Form 8889 (Himanshu Kapoor):
   1. How is line 6 calculated = $3,530. Shouldn’t it be $3,875?
7. Form 8889 (Shweta Oberoi):
   1. How is line 6 calculated = $4,220. Shouldn’t it be $3,875?
8. Form 8959:
   1. Line 9 should be $250,000
   2. Line 15 should be $250,000
9. Form 8960:
   1. Line 1 Taxable interest is $368, not $352.
10. Form 8582: is this needed? We discussed no self-employment.
11. Schedule E:
    1. Line 19: Change OTHES to OTHERS
    2. How did you determine Depreciation expense or depletion = $10,500 ?
    3. Please schedule a call to review the expense amounts.
12. Page 38 onwards, the forms are repeating.