

**AllStates CPA**  
**6660 NORTH HIGH STREET, SUITE 1-H**  
**WORTHINGTON, OH 43085**  
**614-854-0850**

February 5, 2024

**CONFIDENTIAL**

SANTHI BHOGI  
6415 BRANDON DR  
LEWIS CENTER, OH 43035

Dear Limited Liability Company Member:

We have prepared the enclosed copy of your Schedule K-1 for KAIZEN OHIO INVESTMENTS GROUP LLC limited liability company. It contains your share of the limited liability company's items of income/loss, deductions, credits, and other information for the limited liability company's tax year ended December 31, 2023. These items are to be reported on your federal income tax return; therefore, this schedule should be retained with your tax records and documentation.

Also enclosed is state K-1 information, if applicable. This information should also be retained with your tax records and documentation.

Also enclosed is your basis information. This information consists of your basis in the limited liability company and, if applicable, your share of any suspended or disallowed losses. Retain this information with your tax records; it may be needed to complete your federal income tax return.

If you have any questions, or if we can be of assistance in any way, please call.

Sincerely,

AllStates CPA

PARTNER# 69

651123

OMB No. 1545-0123

Schedule K-1 (Form 1065)

2023

Department of the Treasury Internal Revenue Service

For calendar year 2023, or tax year

beginning ending

Partner's Share of Income, Deductions, Credits, etc.

See separate instructions.

Final K-1 Amended K-1

Part III Partner's Share of Current Year Income, Deductions, Credits, and Other Items

Table with 4 columns: Line number, Description, Column number, and Amount/Other info. Includes rows for Ordinary business income, Net rental real estate income, Credits, Guaranteed payments, Dividends, etc.

Part I Information About the Partnership

Form section for Part I: Partnership's employer identification number (84-2063368), name (KAIZEN OHIO INVESTMENTS GROUP LLC), address (1667 GALLEON BLVD, HILLIARD, OH 43026), and filing status (E-FILE).

Part II Information About the Partner

Form section for Part II: Partner's SSN/TIN (766-74-4344), name (SANTHI BHOGI), and address (6415 BRANDON DR, LEWIS CENTER, OH 43035).

Form section for G, H1, H2, and I1: Partner type (Limited partner), domestic status, and entity type (INDIVIDUAL).

Table for J: Partner's share of profit, loss, and capital. Shows percentages for Beginning and Ending for Profit, Loss, and Capital.

Table for K1: Partner's share of liabilities. Shows dollar amounts for Nonrecourse, Qualified nonrecourse financing, and Recourse liabilities at Beginning and Ending.

Form section for K2 and K3: Check boxes for liability amounts from lower-tier partnerships and guaranties.

Table for L: Partner's Capital Account Analysis. Shows dollar amounts for Beginning capital account (\$13,894), Current year net income (\$73), and Ending capital account (\$13,967).

Form section for M: Did the partner contribute property with a built-in gain (loss)?

Form section for N: Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss).

For IRS Use Only

# SCHEDULE K-1 (1065) BOXES AND CODES

1. Ordinary business income (loss)
2. Net rental real estate income (loss)
3. Other net rental income (loss)
- 4a. Guaranteed payment: Services
- 4b. Guaranteed payment: Capital
- 4c. Guaranteed payment: Total
5. Interest income
- 6a. Ordinary dividends
- 6b. Qualified dividends
- 6c. Dividend equivalents
7. Royalties
8. Net short-term capital gain (loss)
- 9a. Net long-term capital gain (loss)
- 9b. Collectibles (28%) gain (loss)
- 9c. Unrecaptured section 1250 gain
10. Net section 1231 gain (loss)
11. Other income (loss)
  - A Other portfolio income (loss)
  - B Involuntary conversions
  - C Section 1256 contracts & straddles
  - D Mining exploration costs recapture
  - E Cancellation of debt
  - F Section 743(b) positive adjustments
  - G Reserved for future use
  - H Section 951(a) income inclusions
  - I Gain (loss) from disposition of oil, gas, geothermal, or other mineral properties (section 59(e))
  - J Recoveries of tax benefit items
  - K Gambling gains and losses
  - L Any income, gain, or loss to the partnership from a distribution under section 751(b)
  - M Gain eligible for section 1045 rollover (replacement stock purchased by partnership)
  - N Gain eligible for section 1045 rollover (replacement stock not purchased by partnership)
  - O Sale or exchange of QSB stock with section 1202 exclusion
  - P Gain or loss on disposition of farm recapture property and other items to which section 1252 applies
  - Q Gain or loss on Fannie Mae or Freddie Mac qualified preferred stock
  - R Specially allocated ordinary gain (loss)
  - S Non-portfolio capital gain (loss)
  - T through X Reserved for future use
  - ZZ Other income (loss)
12. Section 179 deduction
13. Other deductions
  - A Cash contributions (60%)
  - B Cash contributions (30%)
  - C Noncash contributions (50%)
  - D Noncash contributions (30%)
  - E Capital gain property to a 50% organization (30%)
  - F Capital gain property (20%)
  - G Contributions (100%)
  - H Investment interest expense
  - I Deductions – royalty income
  - J Section 59(e)(2) expenditures
  - K Excess business interest expense
  - L Deductions – portfolio income (other)
  - M Amounts paid for medical insurance
  - N Educational assistance benefits
  - O Dependent care benefits
  - P Preproductive period expenses
  - Q Reserved for future use
  - R Pensions and IRAs
  - S Reforestation expense deduction
  - T and U Reserved for future use
  - V Section 743(b) negative adjustments
  - W Soil and water conservation
  - X Film, television, and theatrical production expenditures
13. Other deductions, continued
  - Y Expenditures for removal of barriers
  - Z Itemized deductions
  - AA Contributions to a capital construction fund (CCF)
  - AB Penalty on early withdrawal of savings
  - AC Interest expense allocated to debt-financed distributions
  - AD Interest expense on working interest in oil or gas
  - AE Deductions - portfolio income
  - AF through AJ Reserved for future use
  - ZZ Other deductions
14. Self-employment earnings (loss)
  - A Net earnings (loss) from self-employment
  - B Gross farming or fishing income
  - C Gross non-farm income
15. Credits
  - A Zero-emission nuclear power production credit
  - B Production from advanced nuclear power facilities credit
  - C Low-income housing cr (sec 42(j)(5)) from post-2007 bldgs
  - D Low-income housing cr (other) from post-2007 bldgs
  - E Qualified rehabilitation expenditures (rental real estate)
  - F Other rental real estate credits
  - G Other rental credits
  - H Undistributed capital gains credit
  - I Biofuel producer credit
  - J Work opportunity credit
  - K Disabled access credit
  - L Empowerment zone employment credit
  - M Credit for increasing research activities
  - N Credit for employer social security and Medicare taxes
  - O Backup withholding
  - P Unused investment cr from qualifying advanced coal project cr or qualifying gasification project cr from cooperatives
  - Q Unused investment credit from qualifying advanced energy project cr from cooperatives
  - R Unused investment cr from qualifying advanced manufacturing investment cr from cooperatives
  - S Reserved for future use
  - T Unused investment cr from the energy cr from cooperatives
  - U Unused investment cr from rehabilitation cr from cooperatives
  - V Advanced manufacturing production credit
  - W and X Reserved for future use
  - Y Clean hydrogen production credit
  - Z Orphan drug credit
  - AA Enhanced oil recovery credit
  - AB Renewable electricity production credit
  - AC Biodiesel, renewable diesel, or sustainable aviation fuels cr
  - AD New markets credit
  - AE Credit for small employer pension plan startup costs
  - AF Credit for small employer auto-enrollment
  - AG Credit for small employer military spouse retirement plan
  - AH Credit for employer-provided childcare facilities and services
  - AI Low sulfur diesel fuel production credit
  - AJ Qualified railroad track maintenance credit
  - AK Credit for oil and gas production from marginal wells
  - AL Distilled spirits credit
  - AM Energy efficient home credit
  - AN Alternative motor vehicle credit
  - AO Alternative fuel vehicle refueling property credit
  - AP Clean renewable energy bond credit
  - AQ New clean renewable energy bond credit
  - AR Qualified energy conservation bond credit
  - AS Qualified zone academy bond credit
  - AT Qualified school construction bond credit
  - AU Build America bond credit
  - AV Credit for employer differential wage payments
  - AW Carbon oxide sequestration credit
  - AX Carbon oxide sequestration credit recapture
  - AY New clean vehicles credit
  - AZ Qualified commercial clean vehicle credit
  - BA Credit for small employer health insurance premiums
  - BB Employer credit for paid family and medical leave
  - BC Transferred credits, section 6418
  - BD through BG Reserved for future use
  - ZZ Other credits
16. Alternative minimum tax (AMT) items
  - A Post-1986 depreciation adjustment
  - B Adjusted gain or loss
  - C Depletion (other than oil & gas)
  - D Oil, gas, & geothermal – gross income
  - E Oil, gas, & geothermal – deductions
  - F Other AMT items
17. Tax-exempt income and nondeductible expenses
  - A Tax-exempt interest income
  - B Other tax-exempt income
  - C Nondeductible expenses
18. Distributions
  - A Cash and marketable securities
  - B Distribution subject to section 737
  - C Other property
19. Other information
  - A Investment income
  - B Investment expenses
  - C Fuel tax credit information
  - D Qualified rehabilitation expenditures (other than RRE)
  - E Basis of energy property
  - F Recap of low-income housing cr for sec 42(j)(5) ptrshps
  - G Recap of low-income housing cr for other ptrshps
  - H Recapture of investment credit
  - I Recapture of other credits
  - J Look-back interest – completed long-term contracts
  - K Look-back interest – income forecast method
  - L Dispositions of property with section 179 deductions
  - M Recapture of section 179 deduction
  - N Business interest expense (information item)
  - O Section 453(l)(3) information
  - P Section 453A(c) information
  - Q Section 1260(b) information
  - R Interest allocable to production expenditures
  - S Capital construction fund (CCF) nonqualified withdrawals
  - T Depletion deduction
  - U Section 743(b) basis adjustment
  - V Unrelated business taxable income
  - W Precontribution gain (loss)
  - X Payment obligations incl guarantees and deficit obligations
  - Y Net investment income
  - Z Section 199A information
  - AA Section 704(c) information
  - AB Section 751 gain (loss)
  - AC Section 1(h)(5) gain (loss)
  - AD Deemed section 1250 unrecaptured gain
  - AE Excess taxable income
  - AF Excess business interest income
  - AG Gross receipts for section 448(c)
  - AH Noncash charitable contributions
  - AI Interest and tax on deferred compensation to partners
  - AJ Excess business loss limitation
  - AK Gain from mark-to-market election
  - AL Section 721(c) partnership
  - AM Section 1061 information
  - AN Farming and fishing income
  - AO PTP information
  - AP Inversion gain
  - AQ Conservation reserve program payments
  - AR IRA disclosure
  - AS Qualifying advanced coal project property and qualifying gasification project property
  - AT Qualifying advanced energy project property
  - AU Advanced manufacturing investment property
  - AV Reserved for future use
  - AW Reportable transactions
  - AX Reserved for future use
  - AY Foreign partners, Form 8990, Schedule A
  - AZ through BD Reserved for future use
  - ZZ Other information
20. Foreign taxes paid or accrued

842063368 KAIZEN OHIO INVESTMENTS GROUP LLC

84-2063368

FYE: 12/31/2023

**Federal Statements**

**SANTHI BHOGI**

**766-74-4344**

**Schedule K-1, Line 3 - Other Net Rental Income (Loss)**

<u>Description</u>	<u>Amount</u>	<u>Disposed</u>
0 BLACKS RD SW, PATASKALA OH	\$ 73	

**Schedule K-1, Line 20 - Other Information**

<u>Code</u>	<u>Description</u>	<u>Amount</u>
AG	GROSS RECEIPTS FOR 2022	\$ 75
AG	GROSS RECEIPTS FOR 2021	75
AG	GROSS RECEIPTS FOR 2020	75

PARTNER# 69

Schedule <b>K-1</b>	<b>Analysis of Partner's K-1, Current Year Net Income (Loss) Worksheet</b>	<b>2023</b>
For calendar year 2023, or tax year beginning _____, and ending _____		

Partnership Name KAIZEN OHIO INVESTMENTS GROUP LLC	Employer Identification Number 84-2063368
Partner's Name SANTHI BHOGI	Taxpayer Identification Number 766-74-4344

Items Included in Current Year Income (Loss):

SCHEDULE K ADDITIONS:

NET OTHER RENTAL INCOME/LOSS	73
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SUBTOTAL	73
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TOTAL PER SCHEDULE K-1, CURRENT YEAR NET INCOME (LOSS)	73
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PARTNER# 69

Schedule <b>K-1</b>	<b>Partner's Section 199A Information Worksheet</b>	<b>2023</b>
For calendar year 2023, or tax year beginning _____, and ending _____		

Partnership Name KAIZEN OHIO INVESTMENTS GROUP LLC	Employer Identification Number 84-2063368
Partner's Name SANTHI BHOGI	Taxpayer Identification Number 766-74-4344

**Schedule K-1, Box 20, Code Z - Section 199A Information**

	Pass-through Entity EIN	Aggr. Number	SSTB	PTP
Activity Description				
<b>Column A</b> ..... 0 BLACKS RD SW, PATASKALA OH				
<b>Column B</b> .....				
<b>Column C</b> .....				
<b>Column D</b> .....				
<b>Column E</b> .....				

	Column A	Column B	Column C	Column D	Column E
<b>QBI or Qualified PTP items:</b>					
Ordinary business income (loss)					
Net rental real estate income (loss)					
Other net rental income (loss)	73				
Royalties					
Section 1231 gain (loss)					
Other income (loss)					
Section 179 deduction					
Other deductions					
<b>W-2 wages</b>					
<b>Qualified property</b>					
<b>Other Information:</b>					
QBI alloc to co-op pmts received					
W-2 wages alloc to qualified pmts					
Section 199A(g) deduction					

**Section 199A REIT dividends**

PARTNER# 69

**Partner's Basis Worksheet, Page 1**

Schedule <b>K-1</b>	For calendar year 2023, or tax year beginning _____, and ending _____	<b>2023</b>
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Partnership Name KAIZEN OHIO INVESTMENTS GROUP LLC	Employer Identification Number 84-2063368
Partner's Name SANTHI BHOGI	Taxpayer Identification Number 766-74-4344

<b>Beginning of year</b>		13,894
Capital contributions: Cash		
Property (adjusted basis)		
Income items: Ordinary business income		
Net rental real estate income		
Other net rental income	73	
Interest		
Dividends		
Royalties		
Net short-term capital gain		
Net long-term capital gain		
Net section 1231 gain		
Other portfolio income		
Other income		
Tax-exempt interest and other tax-exempt income		73
Excess depletion		
Transfer of capital		
Gain on disposition of section 179 assets		
Other increases		
Distributions: Cash		
Property (adjusted basis)	( )	
Change in liabilities: Current year		
Prior year	( )	
<b>Subtotal</b>		<b>13,967</b>
Distribution in excess of partner basis		
Noncapital expenses: Nondeductible expenses		
Deductible losses: Ordinary business loss		
Net rental real estate loss		
Other net rental loss		
Royalties		
Net short-term capital loss		
Net long-term capital loss		
Net section 1231 loss		
Other portfolio loss		
Other losses		
Section 179 deduction		
Charitable contributions		
Investment interest expense		
Section 59(e)(2) expenditures		
Portfolio income deductions		
Other deductions		
Foreign taxes		
Loss on disposition of section 179 assets		
Depletion		
Other decreases		
<b>End of year</b>		<b>13,967</b>

Note to partner: This worksheet was prepared based on partnership records. Please consult with your tax advisor for adjustments.

PARTNER# 69

OH Cities Partner's Share of Income and Tax Paid Worksheet

2023

Form OH Cities Schedule K-1

For calendar year 2023, or other taxable year beginning , and ending

Partner's identifying number 766-74-4344

Partnership's identifying number 84-2063368

Partner's name, address, and ZIP Code
SANTHI BHOGI
6415 BRANDON DR
LEWIS CENTER OH 43035

Partnership's name, address, and ZIP code
KAIZEN OHIO INVESTMENTS GROUP LLC
1667 GALLEON BLVD
HILLIARD OH 43026

Table with 3 columns: Partner's percentage of, Beginning of year, End of Year. Rows include Profit sharing, Loss sharing, and Ownership of Capital, all showing 1.000000%.

Table with 5 columns: City Name, Amount Taxable, Tax Rate, Tax Paid, Amended, Final. Includes entry for RITA MUNICIPALITIES PATASKALA with Amount Taxable 66, Tax Rate 1.000, and Tax Paid 1.