#### Department of the Treasury Internal Revenue Service

### **IRS e-file Signature Authorization**

OMB No. 1545-0074

ERO must obtain and retain completed Form 8879. ▶ Go to www.irs.gov/Form8879 for the latest information.

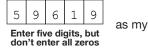
Submission Identification Number (SID) Taxpayer's name Social security number NISSI PRASHANTH AMBATI 303-85-9619 Spouse's name Spouse's social security number 983-94-2232 MOUNISHA KUNCHANGI Tax Return Information – Tax Year Ending December 31, 2023 (Enter year you are authorizing.) Part I Enter whole dollars only on lines 1 through 5. Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank. Adjusted gross income 86,656. 1 1 13,666. 2 2 3 3 15,085. 4 4 1,419. 5 5

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

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 LLC to enter or generate my PIN |   |             |           |      | FBO firm name |                             | Ē | n      |
|--|---|-------------|-----------|------|---------------|-----------------------------|---|--------|
|  | X | l authorize | GLOBAL TA | AXES | LLC           | to enter or generate my PIN | Ľ | С<br>— |



2

as mv

2

2 3

Enter five digits, but don't enter all zeros

4

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

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

X lauthorize GLOBAL TAXES LLC 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 s | ignature 🕨 Da  | ate 🖡 |    |  |                 |      |   |   |   |
|------------|--|-------|----|--|-----------------|------|---|---|---|
|            | Practitioner PIN Method Returns Only—continue  | bel   | ow |  |                 |      |   |   |   |
| Part III   | Certification and Authentication – Practitioner PIN Method Only                        |       |    |  |                 |      |   |   |   |
| ERO's EFI  | N/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.        | 2     | 2  |  | <br>6           | <br> | 2 | 7 | 1 |
| ERO's EFI  | <b>N/PIN.</b> Enter your six-digit EFIN followed by your five-digit self-selected PIN. | 2     | 2  |  | <br>6<br>nter a | <br> | 2 | 7 | 1 |

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 🕨 |                                 |  |  |  |  |  |
|------------------------------------|---|--------|---------------------------------|--|--|--|--|--|
|                                    | RO Must Retain This Form — See<br>mit This Form to the IRS Unless |        |                                 |  |  |  |  |  |
| For Denemoral Deduction Act Nation | to y wet was included in a set                                    |        | Earm <b>8870</b> (Bay, 01 2021) |  |  |  |  |  |

For Paperwork Reduction Act Notice, see your tax return instructions. BAA REV 01/21/24 PRO

Date

to enter or generate my PIN

| <b>1040</b>  |         | artment of the Treasury—Internal Revenue Servi<br>S. Individual Income Tax  |   | turn       | 202             | 3             | OMB No. 1545    | -0074  | IRS Use On    | ly—Do not v                | vrite or stap               | ble in this space.      |  |  |
|--|---------|---|---|------------|-----------------|---------------|-----------------|--------|---------------|----------------------------|-----------------------------|-------------------------|--|--|
| For the year Jan                                       | . 1–Dec | c. 31, 2023, or other tax year beginning  |   |            | , 2023, end     | ding          | 1               |        | , 20          | See separate instructions. |                             |                         |  |  |
| Your first name  | and m   | iddle initial   | Last n  | ame        | Ime             |               |                 |        |               |                            | Your social security number |                         |  |  |
| NISSI PF   | RASH    | АМТН  | AMB   | АТТ        |                 |               |                 |        |               | 303                        | 303 85 9619                 |                         |  |  |
|  |         | s first name and middle initial   | Last n  |            |                 |               |                 |        |               |                            |                             | security number         |  |  |
| MOUNISHA   | 7       |   | KIIN  | CHANGI     | -               |               |                 |        |               | 983                        | 94                          | 2232                    |  |  |
|  |         | er and street). If you have a P.O. box, see   |   |            |                 |               |                 | A      | pt. no.       |                            |                             | ction Campaign          |  |  |
|  | -       | BRIDGEPORT ST   |   |            |                 |               |                 |        |               |                            |                             | ou, or your             |  |  |
|  |         | ce. If you have a foreign address, also co  | mplete  | spaces be  | low.            | Sta           | ate             | ZIP c  | ode           | spouse                     | if filing jo                | pintly, want \$3        |  |  |
| FREMONT  |         |   | •   | ·          |                 | CA            | 4               | 945    | 55            |                            |                             | d. Checking a ot change |  |  |
| Foreign country  | / name  |   |   | Foreign p  | rovince/state/  |               |                 |        | n postal code |                            | x or refun                  | •                       |  |  |
|  |         |   |   |            |                 |               |                 |        |               |                            | 🗌 Υοι                       | u 🗌 Spouse              |  |  |
| Filing Status  |         | Single  |   |            |                 |               | Head of h       | ouseh  | old (HOH)     |                            |                             |                         |  |  |
| -  |         | Married filing jointly (even if only or   | ne had  | income)    |                 |               |                 |        | ( )           |                            |                             |                         |  |  |
| Check only<br>one box.                                 |         | ] Married filing separately (MFS)   |   | ,          |                 |               | Qualifying      | surviv | ring spouse   | (QSS)                      |                             |                         |  |  |
|  | lf y    | you checked the MFS box, enter the  | name  | of your s  | pouse. If you   | u che         |                 |        | •             | . ,                        | ild's nan                   | ne if the               |  |  |
|  |         | alifying person is a child but not you  |   |            |                 |               |                 |        |               |                            |                             |                         |  |  |
| Divital  |         | ny time during 2022, did your (a) rea   |   |            | d oword or      | <b>n</b> 01/r | mont for propo  | rt or  |               |                            |                             |                         |  |  |
| Digital<br>Assets                                      |         | ny time during 2023, did you: (a) rece<br>nange, or otherwise dispose of a digi   |   |            |                 |               |                 | -      |               |                            | Yes                         | s 🛛 No                  |  |  |
| Standard   |         | neone can claim:  You as a de   |   | · _        |                 |               | a dependent     |        |               |                            |                             |                         |  |  |
| Deduction  |         | Spouse itemizes on a separate return  | •   |            | •               |               | •               |        |               |                            |                             |                         |  |  |
| Age/Blindness  | s You:  | : Were born before January 2, 1   | 959   | Are b      | lind Spa        | ouse          | : 🗌 Was bor     | m befo | ore January   | 2, 1959                    |                             | blind                   |  |  |
| Dependents   |         | •   |   |            | Social security |               | (3) Relationsh  | 14     | ,             |                            |                             | ee instructions):       |  |  |
| If more  |         | irst name Last name   |   |            | number          |               | to you          |        | Child tax     | credit                     | Credit for                  | other dependents        |  |  |
| than four  | -       |   |   |            |                 |               |                 |        |               |                            | [                           |                         |  |  |
| dependents,  |         |   |   |            |                 |               |                 |        |               |                            | [                           |                         |  |  |
| see instructions<br>and check                          | s ——    |   |   |            |                 |               |                 |        |               |                            | [                           |                         |  |  |
| here   |         |   |   |            |                 |               |                 |        |               |                            |                             |                         |  |  |
| Income   | 1a      | Total amount from Form(s) W-2, be   | ox 1 (s   | ee instruc | ctions) .       |               |                 |        |               | . 1a                       | 1                           | 103,545.                |  |  |
| Attach Form(s)   | b       | Household employee wages not re   | eporte  | d on Form  | n(s) W-2 .      |               |                 |        |               | . 1t                       | ,                           |                         |  |  |
| W-2 here. Also   | С       | Tip income not reported on line 1a (see instructions)   |   |            |                 |               |                 |        |               |                            | ;                           |                         |  |  |
| attach Forms   | d       | Medicaid waiver payments not reported on Form(s) W-2 (see instructions)   |   |            |                 |               |                 |        |               |                            | ł                           |                         |  |  |
| W-2G and<br>1099-R if tax                              | е       | Taxable dependent care benefits from Form 2441, line 26       . |   |            |                 |               |                 |        |               | . 1e                       | ;                           |                         |  |  |
| was withheld.  | f       | Employer-provided adoption bene   | efits fro   | m Form 8   | 839, line 29    | ), line 29    |                 |        |               | . 1f                       | :                           |                         |  |  |
| If you did not   | g       | Wages from Form 8919, line 6 .  | · · · · · · · · · · · · · · · · · · ·                                 |            |                 |               |                 |        |               | . 10                       | J                           |                         |  |  |
| get a Form<br>W-2, see                                 | h       | Other earned income (see instructi  | ions)   |            |                 |               |                 | · ·    |               | . 11                       | 1                           | 0.                      |  |  |
| instructions.  | i       | Nontaxable combat pay election (s   | see ins   | tructions) |                 |               | <b>1</b> i      |        |               |                            |                             |                         |  |  |
|  | z       | Add lines 1a through 1h   | • ;   |            | · · ;           |               |                 |        |               | . 1z                       | :                           | 103,545.                |  |  |
| Attach Sch. B  | 2a      | Tax-exempt interest   | 2a  |            |                 | bΤ            | axable interest | t.     |               | . 2t                       | ,                           |                         |  |  |
| if required.   | 3a      | Qualified dividends   | 3a  |            |                 | bС            | Ordinary divide | nds .  |               | . 3b                       | ,                           |                         |  |  |
| Standard   | 4a      | IRA distributions   | 4a  |            |                 | bΤ            | axable amoun    | t      |               | . 4b                       | <u>،</u>                    |                         |  |  |
| Standard<br>Deduction for—                             | 5a      | Pensions and annuities  | 5a  |            |                 |               | axable amoun    |        |               | . 5b                       | <u>،</u>                    |                         |  |  |
| <ul> <li>Single or<br/>Marriad filing</li> </ul>       | 6a      | , _   | 6a  |            |                 |               | axable amoun    | t      |               | . 6t                       | ,                           |                         |  |  |
| Married filing separately,                             | С       | If you elect to use the lump-sum e  |   |            |                 | `             | ,               |        |               |                            |                             |                         |  |  |
| \$13,850<br>• Married filing                           | 7       | Capital gain or (loss). Attach Schee  | dule D  | if require | d. If not requ  | uired         | , check here    |        |               |                            |                             |                         |  |  |
| jointly or   | 8       | Additional income from Schedule   |   |            |                 |               |                 |        |               | · 8                        |                             | -16,889.                |  |  |
| Qualifying<br>surviving spouse,                        | 9       | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,  | es 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> |            |                 |               |                 |        |               |                            |                             | 86,656.                 |  |  |
| \$27,700<br>• Head of                                  | 10      | Adjustments to income from Sche   |   |            |                 |               |                 |        |               | . 10                       | <u>'</u>                    |                         |  |  |
| household,   | 11      | Subtract line 10 from line 9. This is your adjusted gross income  |   |            |                 |               |                 |        |               |                            | I                           | 86,656.                 |  |  |
| <ul> <li>\$20,800</li> <li>If you checked T</li> </ul> | 12      | Standard deduction or itemized deductions (from Schedule A)   |   |            |                 |               |                 |        |               |                            |                             | 27,700.                 |  |  |
| any box under<br>Standard                              | 13      | Qualified business income deduction from Form 8995 or Form 8995-A   |   |            |                 |               |                 |        |               |                            | 3                           |                         |  |  |
| Deduction,   | 14      | Add lines 12 and 13   |   |            |                 |               |                 |        |               | . 14                       | <u>با</u>                   | 27,700.                 |  |  |
| see instructions.                                      | 15      | Subtract line 14 from line 11. If zer   | ro or le  | ss, enter  | -0 This is y    | our           | taxable incom   | ie.    |               | . 15                       | i                           | 58,956.                 |  |  |

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 any from Form   | (s): <b>1</b> 🗌 881 | 4 <b>2</b> 4972  | 3 🗌               |               | 16                                      | 6,637.                    |
| Credits           | 17      | Amount from Schedule 2, lin   | e3                 |                     |                  |                   |               | 17                                      | 7,029.                    |
|                   | 18      | Add lines 16 and 17   |                    |                     |                  |                   |               | 18                                      | 13,666.                   |
|                   | 19      | Child tax credit or credit for  | other dependent    | ts from Sched       | ule 8812         |                   |               | 19                                      |                           |
|                   | 20      | Amount from Schedule 3, lin   | e8                 |                     |                  |                   |               | 20                                      |                           |
|                   | 21      | Add lines 19 and 20   |                    |                     |                  |                   |               | 21                                      |                           |
|                   | 22      | Subtract line 21 from line 18   | . If zero or less, | enter -0            |                  |                   |               | 22                                      | 13,666.                   |
|                   | 23      | Other taxes, including self-e   | mployment tax,     | from Schedule       | e 2, line 21 .   |                   |               | 23                                      | 0.                        |
|                   | 24      | Add lines 22 and 23. This is  |                    |                     |                  |                   |               | 24                                      | 13,666.                   |
| Payments          | 25      | Federal income tax withheld   |                    |                     |                  |                   |               |   |                           |
|                   | а       | Form(s) W-2   |                    |                     |                  | <b>25a</b> 15     | ,085.         |   |                           |
|                   | b       | Form(s) 1099  |                    |                     |                  | 25b               |               |   |                           |
|                   | с       | Other forms (see instructions   | s)                 |                     |                  | 25c               |               |   |                           |
|                   | d       | Add lines 25a through 25c   | ,                  |                     |                  |                   |               | 25d                                     | 15,085.                   |
| If you have a     | 26      | 2023 estimated tax payment  |                    |                     |                  |                   |               | 26                                      |                           |
| qualifying child, | 27      | Earned income credit (EIC)  |                    | ••                  |                  | 27                |               |   |                           |
| attach Sch. EIC.  | 28      | Additional child tax credit from  |                    |                     |                  | 28                |               |   |                           |
|                   | 29      | American opportunity credit   |                    |                     |                  | 29                |               |   |                           |
|                   | 30      | Reserved for future use .   |                    |                     |                  | 30                |               |   |                           |
|                   | 31      | Amount from Schedule 3, lin   |                    |                     |                  | 31                |               |   |                           |
|                   | 32      | Add lines 27, 28, 29, and 31  |                    |                     |                  | -                 |               | 32                                      |                           |
|                   | 33      | Add lines 25d, 26, and 32. T  | •                  | -                   | -                |                   |               | 33                                      | 15,085.                   |
| Refund            | 34      | If line 33 is more than line 24   |                    |                     |                  |                   |               | 34                                      | 1,419.                    |
| nerana            | 35a     | Amount of line 34 you want  |                    |                     |                  | •                 |               | 35a                                     | 1,419.                    |
| Direct deposit?   | b       | Routing number 1 2 1  | 0 0 0 3            | 5 8                 |                  |                   | Savings       |   |                           |
| See instructions. | ď       | Account number 3 2 5  |                    |                     |                  |                   | earnige       |   |                           |
|                   | 36      | Amount of line 34 you want a  |                    |                     |                  | 36                |               |   |                           |
| Amount            | 37      | Subtract line 33 from line 24   | •••••              |                     |                  |                   |               |   |                           |
| You Owe           | 0/      | For details on how to pay, g  |                    |                     |                  |                   |               | 37                                      |                           |
|                   | 38      | Estimated tax penalty (see in   |                    |                     |                  | 38                |               |   |                           |
| Third Party       |         | you want to allow another   | ,                  |                     |                  |                   |               |   |                           |
| Designee          |         | structions  | •                  |                     |                  |                   | omplete b     | elow.                                   | 🗙 No                      |
|                   | De      | signee's  |                    | Phone               |                  |                   | onal identifi | cation                                  |                           |
|                   | nai     |   |                    | no.                 |                  |                   | oer (PIN)     |   |                           |
| Sign              |         | der penalties of perjury, I declare the<br>ief, they are true, correct, and com |                    |                     |                  |                   |               |   |                           |
| Here              |         |   | piete. Declaration | 、                   | 1                |                   |               | • •                                     | , 0                       |
|                   | Yo      | ur signature  |                    | Date                | Your occupation  |                   |               | nt you an Identity<br>IN, enter it here |                           |
| Joint return?     |         |   |                    |                     | EMPLOYEE         |                   | (see ii       |   | in, enter it here         |
| See instructions. | Sp      | ouse's signature. If a joint return, <b>i</b>                                   | ooth must sian.    | Date                | Spouse's occupat | nt your spouse an |               |   |                           |
| Keep a copy for   | -1-     |   |                    |                     |                  |                   | Identi        | ty Prote                                | ection PIN, enter it here |
| your records.     |         |   |                    |                     | HOHE MAKE        | (see ii           | see inst.)    |   |                           |
|                   | Ph      | one no. (510) 458-181   | 7                  | Email address       | NISSI.PRASH      | ANTH@GMAIL.CO     | M             |   |                           |
| Paid              | Pre     | eparer's name   | Preparer's signat  | ure                 |                  | Date              | PTIN          |   | Check if:                 |
| Preparer          | SYAM    | I PRIYA RAM SAGAR GUPTA TALLAM  | SYAM PRIYA         | RAM SAGAR           | GUPTA TALLAM     | 01/30/2024        | P02082        | 703                                     | Self-employed             |
| Use Only          | Fir     | m's name GLOBAL TAX   | XES LLC            |                     |                  |                   | Phon          | eno. (                                  | (678)965-9522             |
|                   | Fir     | m's address 245 ROONE   | Y CT E BRU         | NSWICK N            | J 08816          |                   | Firm's        | s EIN                                   | 84-3171965                |
| Go to www.irs.go  | ov/Form | n1040 for instructions and the late   | st information.    |                     | BAA              | REV 01/21/24 PRO  |               |   | Form <b>1040</b> (2023)   |

| SCHEDULE    | 1 |
|-------------|---|
| (Form 1040) |   |

### **Additional Income and Adjustments to Income**

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

OMB No. 1545-0074

Department of the Treasury Attachment Go to www.irs.gov/Form1040 for instructions and the latest information. Internal Revenue Service Sequence No. 01 Name(s) shown on Form 1040, 1040-SR, or 1040-NR Your social security number NISSI PRASHANTH AMBATI & MOUNISHA KUNCHANGI 303-85-9619 Part Additional Income 1 1 0. 2a 2a b Date of original divorce or separation agreement (see instructions): 3 3 4 4 -16,889. 5 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E 5 6 Farm income or (loss). Attach Schedule F. 6 7 7 8 Other income: Net operating loss 8a а 8b b Cancellation of debt 8c С Foreign earned income exclusion from Form 2555 d 8d 8e е 8f f 8g g 8h h i Prizes and awards 8i 8i i 8k Т 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 Section 951(a) inclusion (see instructions) 8n n Section 951A(a) inclusion (see instructions) . . . . . . . . . . . . 0 80 Section 461(I) excess business loss adjustment 8p р Taxable distributions from an ABLE account (see instructions) . . . 8q α Scholarship and fellowship grants not reported on Form W-2 . . . 8r r Nontaxable amount of Medicaid waiver payments included on Form S 8s Pension or annuity from a nongualifed deferred compensation plan or t a nongovernmental section 457 plan 8t Wages earned while incarcerated . . . . . . . . . . . . . 8u u Other income. List type and amount: z 8z 9 9 10 Combine lines 1 through 7 and 9. This is your additional income. Enter here and on Form 10 -16,889.

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

Schedule 1 (Form 1040) 2023

| Part     | Adjustments to Income  |            |            |        |                      |
|----------|--|------------|------------|--------|----------------------|
| 11       | Educator expenses  |            |            | <br>11 |                      |
| 12       | Certain business expenses of reservists, performing artists, and fee   |            |            |        |                      |
|          | officials. Attach Form 2106  |            |            | <br>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  |            |            |        |                      |
| -        | 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:   |            | • •        | <br>   |                      |
| <br>a    |  | 24a        |            |        |                      |
| -        | Deductible expenses related to income reported on line 81 from the   | 2.10       |            |        |                      |
| N        |  | 24b        |            |        |                      |
| С        | Nontaxable amount of the value of Olympic and Paralympic medals  | - 10       |            | -      |                      |
| Ŭ        | and USOC prize money reported on line 8m   | 24c        |            |        |                      |
| d        | Reforestation amortization and expenses  | 24d        |            | -      |                      |
| e        | Repayment of supplemental unemployment benefits under the Trade  | 2.10       |            | -      |                      |
| C        | Act of 1974  | 24e        |            |        |                      |
| f        | Contributions to section 501(c)(18)(D) pension plans   | 24f        |            | -      |                      |
| q        | Contributions by certain chaplains to section 403(b) plans   | 24g        |            | -      |                      |
|          | Attorney fees and court costs for actions involving certain unlawful   | 2-TY       |            | <br>-  |                      |
|          | discrimination claims (see instructions)   | 24h        |            |        |                      |
| :        |  | 2411       |            | -      |                      |
|          | Attorney fees and court costs you paid in connection with an award<br>from the IRS for information you provided that helped the IRS detect |            |            |        |                      |
|          | tax law violations   | 24i        |            |        |                      |
| :        | Housing deduction from Form 2555   | 24i<br>24j |            |        |                      |
| ן<br>ר   | Excess deductions of section 67(e) expenses from Schedule K-1 (Form  | 24j        |            |        |                      |
| ĸ        |  | 24k        |            |        |                      |
| -        | Other adjustments. List type and amount:   | 24N        |            | -      |                      |
| z        | Other aujustitients. List type and antount.  | 24z        |            |        |                      |
| 25       | Total other adjustments. Add lines 24a through 24z   |            |            | 25     |                      |
| 25<br>26 | Add lines 11 through 23 and 25. These are your <b>adjustments to income</b>  |            |            | <br>23 |                      |
| 20       | Form 1040, 1040-SR, or 1040-NR, line 10  |            |            | 26     |                      |
|          | BAA  |            | 01/21/24 P |        | le 1 (Form 1040) 202 |

| SCHEDULE    | 2 |
|-------------|---|
| (Form 1040) |   |

# **Additional Taxes**

OMB No. 1545-0074

23

20

| 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. |          |                    |  |  |  |  |  |
|------|---|----------|--------------------|--|--|--|--|--|
| Name | e(s) shown on Form 1040, 1040-SR, or 1040-NR Y  | our soci | al security number |  |  |  |  |  |
| NIS  | SI PRASHANTH AMBATI & MOUNISHA KUNCHANGI  | 303-85-  | -9619              |  |  |  |  |  |
| Pa   | rt I Tax  |          |                    |  |  |  |  |  |
| 1    | Alternative minimum tax. Attach Form 6251   | 🗋        | 1                  |  |  |  |  |  |
| 2    | Excess advance premium tax credit repayment. Attach Form 8962   | 🛓        | <b>2</b> 7,029.    |  |  |  |  |  |
| 3    | Add lines 1 and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17  |          | <b>3</b> 7,029.    |  |  |  |  |  |
| Pa   | rt II Other Taxes   |          |                    |  |  |  |  |  |
| 4    | Self-employment tax. Attach Schedule SE   |          | 4                  |  |  |  |  |  |
| 5    | Social security and Medicare tax on unreported tip income.5Attach Form 41375  |          |                    |  |  |  |  |  |
| 6    | Uncollected social security and Medicare tax on wages. AttachForm 89196   |          |                    |  |  |  |  |  |
| 7    | Total additional social security and Medicare tax. Add lines 5 and 6 $\ldots$ .   |          | 7                  |  |  |  |  |  |
| 8    | Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if require   | red.     |                    |  |  |  |  |  |
|      | If not required, check here   |          | 8                  |  |  |  |  |  |
| 9    | Household employment taxes. Attach Schedule H   | 🧕        | 9                  |  |  |  |  |  |
| 10   | Repayment of first-time homebuyer credit. Attach Form 5405 if required  | 1        | 10                 |  |  |  |  |  |
| 11   | Additional Medicare Tax. Attach Form 8959   | 1        | 11                 |  |  |  |  |  |
| 12   | Net investment income tax. Attach Form 8960   | 1        | 12                 |  |  |  |  |  |
| 13   | Uncollected social security and Medicare or RRTA tax on tips or group-term insurance from Form W-2, box 12                                  |          | 13                 |  |  |  |  |  |
| 14   | Interest on tax due on installment income from the sale of certain residential and timeshares   |          | 14                 |  |  |  |  |  |
| 15   | Interest on the deferred tax on gain from certain installment sales with a sales p<br>over \$150,000  |          | 15                 |  |  |  |  |  |
| 16   | Recapture of low-income housing credit. Attach Form 8611  | 1        | 16                 |  |  |  |  |  |
|      |   | (cont    | tinued 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  | 176              |         |                     |    |
| -   |  | 17b              | -       |                     |    |
|     | Additional tax on HSA distributions. Attach Form 8889  | 17c              | -       |                     |    |
| u   | 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<br>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      |                     |    |
|     | BAA  | REV 01/21/24 PRO | Schedul | le 2 (Form 1040) 20 | 23 |

|          | EDULE E<br>1040)                        | (Eron    | n rontol    | Suppler<br>real estate, royalties, p                                      |             |          |           |                |          | tructo DEMI      | Co. etc.)        |                   | o. 1545-0074             |  |
|----------|---|----------|-------------|---|-------------|----------|-----------|----------------|----------|------------------|------------------|-------------------|--------------------------|--|
| •        | ,                                       | (FIOI    | nrenta      | Attach to For   |             |          | -         |                |          |                  | <i>s</i> , etc.) |                   |                          |  |
|          | nent of the Treasury<br>Revenue Service |          | G           | o to www.irs.gov/Sched  |             |          |           |                |          | formation.       |                  | Attachn<br>Sequen | nent<br>ce No. <b>13</b> |  |
| Name(s)  | ) shown on return                       |          |             |   |             |          |           |                |          |                  | Your soc         | ial security      | number                   |  |
|          | -                                       |          |             | & MOUNISHA KUNC   |             |          |           |                |          |                  | 303-8            | 85-9619           |                          |  |
| Part     | Note: If yo                             | u are ir | n the bu    | om Rental Real Est<br>siness of renting persona<br>m Form 4835 on page 2, | al proper   |          |           | <b>c</b> . See | e instru | ctions. If you a | re an ind        | ividual, rep      | ort farm                 |  |
| Α        |   |          |             | n 2023 that would requ  |             | to file  | Form(s) 1 | 099? 5         | See ins  | structions .     |                  | . 🗌 Ye            | s 🛛 No                   |  |
|          | •                                       |          |             | e required Form(s) 109  |             |          | . ,       |                |          |                  |                  |                   |                          |  |
| 1a       |   |          |             | property (street, city, st  |             |          |           |                |          |                  |                  |                   |                          |  |
| A        |   |          |             | 1 ZAMIST ANPUR,   |             |          | ,         | סגסיו          |          | שביד אמכאמז      | TN 5             | 00020             |                          |  |
| B        | 11110 1-7-5                             | 507 07   | / A/ Z/     | I ZAMISI ANFOR,   | MOSIIL      | IE KAL   | SAD IIIL  |                | AD,      | I LLANGANA       | A IN J           | 00020             |                          |  |
|          |   |          |             |   |             |          |           |                |          |                  |                  |                   |                          |  |
| 1b       | Type of Prope                           | rtv 2    | <b>2</b> Fo | each rental real estate   | e prope     | rtv list | ted       |                | Fa       | ir Rental        | Perso            | nal Use           | 0.11/                    |  |
|          | (from list below                        |          | abo         | ove, report the number  | r of fair i | rental   | and       |                |          | Days             | Da               | ays               | QJV                      |  |
| Α        | 3                                       |          |             | sonal use days. Checl   |             |          |           | Α              |          | 310              |                  | 0                 |                          |  |
| В        |   |          |             | ou meet the requireme<br>alified joint venture. Se                        |             |          |           | В              |          |                  |                  |                   |                          |  |
| С        |   |          | 900         |   |             |          |           | С              |          |                  |                  |                   |                          |  |
|          | of Property:                            |          |             |   | _           |          |           |                | _        |                  |                  |                   |                          |  |
|          | Single Family R                         |          |             | 3 Vacation/Short-Te   | rm Ren      | tal      | 5 Land    |                |          | Self-Rental      | 、                |                   |                          |  |
| 2        | Multi-Family Re                         | sidenc   | ce          | 4 Commercial  |             |          | 6 Roya    | lities         | 8        | Other (descr     | ibe)             |                   |                          |  |
|          |   |          |             |   |             |          |           |                |          | Properti         | es:              |                   |                          |  |
| Incom    |   |          |             |   |             |          |           | Α              |          | В                |                  |                   | С                        |  |
| 3        |   |          |             |   |             | 3        |           | 5              | 80.      |                  |                  |                   |                          |  |
| 4        |   | ved.     |             |   |             | 4        |           |                |          |                  |                  |                   |                          |  |
| Exper    |   |          |             |   |             | _        |           |                |          |                  |                  |                   |                          |  |
| 5        | •                                       |          |             | · · · · · · · · ·   |             | 5        |           |                |          |                  |                  |                   |                          |  |
| 6        |   |          |             | tions)  |             | 6<br>7   |           | 1 0            | 25       |                  |                  |                   |                          |  |
| 7<br>8   | -                                       |          |             |   | • •         | 8        |           | 1,0            | 25.      |                  |                  |                   |                          |  |
| 9        |   |          |             |   | • •         | 9        |           |                |          |                  |                  |                   |                          |  |
| 10       |   |          |             | al fees   |             | 10       |           |                |          |                  |                  |                   |                          |  |
| 11       | -                                       | -        |             |   |             | 11       |           | 1.2            | 68.      |                  |                  |                   |                          |  |
| 12       | -                                       |          |             | anks, etc. (see instruct  |             | 12       |           |                |          |                  |                  |                   |                          |  |
| 13       |   |          |             |   |             | 13       |           |                |          |                  |                  |                   |                          |  |
| 14       |   |          |             |   |             | 14       |           | 4,8            | 51.      |                  |                  |                   |                          |  |
| 15       | Supplies                                |          |             |   |             | 15       |           | 5,0            | 02.      |                  |                  |                   |                          |  |
| 16       |   |          |             |   |             | 16       |           |                |          |                  |                  |                   |                          |  |
| 17       |   |          |             |   |             | 17       |           |                | 68.      |                  |                  |                   |                          |  |
| 18       |   | xpense   | e or de     | pletion   | · ·         | 18       |           | 3,4            | 55.      |                  |                  |                   |                          |  |
| 19<br>20 | Other (list)                            |          |             | through 10  |             | 19       |           | 17 /           | <u> </u> |                  |                  |                   |                          |  |
| 20       | •                                       |          |             | through 19  |             | 20       |           | 17,4           | 09.      |                  |                  |                   |                          |  |
| 21       |   |          |             | (rents) and/or 4 (royalt<br>ctions to find out if you                     |             |          |           |                |          |                  |                  |                   |                          |  |
|          |   |          |             |   |             | 21       | -         | -16,8          | 89.      |                  |                  |                   |                          |  |
| 22       |   |          |             | e loss after limitation,  |             |          |           |                |          |                  |                  |                   |                          |  |
|          |   |          |             | ions)   |             | 22       | (         | 16,88          | 39.)     | (                |                  | )(                | )                        |  |
| 23a      |   |          |             |   |             |          |           | •              | 23a      |                  | 580.             |                   |                          |  |
| b        |   |          | •           | d on line 4 for all royal   |             |          |           |                | 23b      |                  |                  |                   |                          |  |
| С        |   |          | •           | d on line 12 for all pro  |             |          |           |                | 23c      |                  |                  |                   |                          |  |
| d        |   |          | •           | d on line 18 for all pro  |             |          |           |                | 23d      |                  | ,455.            |                   |                          |  |
| e        |   |          | •           | d on line 20 for all pro  |             |          |           |                | 23e      | 17               | ,469.            |                   |                          |  |
| 24<br>25 |   |          |             | unts shown on line 21.  |             |          |           |                |          | • • • • •        | . 24             | (                 | 1                        |  |
| 25<br>00 |   |          |             | om line 21 and rental re  |             |          |           |                |          |                  |                  | l                 | 16,889.)                 |  |
| 26       |   |          |             | id royalty income or<br>and line 40 on page 2                             |             |          |           |                |          |                  |                  |                   |                          |  |
|          |   |          |             | e 5. Otherwise, include   |             |          |           |                |          |                  | . 26             |                   | -16,889.                 |  |
| For Pa   |   |          | -           | , see the separate instr  |             |          | NE        |                |          | -16,889          |                  |                   | form 1040) 2023          |  |

| Form <b>8962</b> |  |
|------------------|--|
|------------------|--|

## **Premium Tax Credit (PTC)**

OMB No. 1545-0074

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

20

|      | ment of the Treas   | sury<br>ce <b>Go</b>   | to www.irs.gov/Form         | n8962 for instruction   |   |                        | st information. Attachment Sequence No. 73 |        |   |  |
|------|---|--|-----------------------------|---|---|------------------------|--|--------|---|--|
| Name | shown on your r   | return   | -                           |   |   | Your soc               | ial security number                        |        |   |  |
| NIS  | SI PRASH  | ANTH AMBATI  | & MOUNISHA KUN              | NCHAN   |   | 303-                   | 85-9619                                    |        |   |  |
| Α.   | You cannot take   | e the PTC if your filing s   | tatus is married filing sep | arately unless you qualify  | for an exception  | on. See ii             | nstructions. If you qua                    | ify, c | heck the box  |  |
| Par  | t Annu  | ual and Monthly  | Contribution An             | nount   |   |                        |  |        |   |  |
| 1    |   |  | mily size. See instruct     |   |   |                        |  | 1      | 2   |  |
| 2a   | ,   |  | ed AGI. See instruction     |   |   | 2a                     | 86,656.                                    |        |   |  |
| b    |   | •  | nts' modified AGI. See      |   |   | 2b                     |  |        |   |  |
| 3    | Household i   | income. Add the amo  | ounts on lines 2a and 2     | 2b. See instructions  |   |                        |  | 3      | 86,656.   |  |
| 4    | Federal pov   | ertv line. Enter the fe  | ederal poverty line amo     | ount from Table 1-1. 1  | -2. or 1-3. Se  | e instru               | ctions. Check the                          |        |   |  |
| -    | appropriate   | box for the federal p  | overty table used. a        | 🗌 Alaska 🛛 b 🗌 H  | awaii c 🛛   | Other 4                | 48 states and DC                           | 4      | 18,310.   |  |
| 5    | Household income as a percentage of federal poverty line (see instructions) |  |                             |   |   |                        |  | 5      | 401 %   |  |
| 6    | Reserved for  | or future use  |                             |   |   |                        |  |        |   |  |
| 7    | Applicable fi   | igure. Using your line   | 5 percentage, locate y      | our "applicable figure"   | on the table ir   | the ins                | tructions                                  | 7      | 0.0850  |  |
| 8a   | Annual contrib  | oution amount. Multiply li   | ne 3 by                     | <b>b</b> Mont   | thly contribution   | on amou                | unt. Divide line 8a                        |        |   |  |
|      | line 7. Round   | to nearest whole dollar a  | mount 8a                    | 7,366. by 12  | 2. Round to ne  | arest wh               | ole dollar amount                          | 8b     | 614.  |  |
| Par  | t II Pren   | nium Tax Credit  | Claim and Reco              | nciliation of Adva  | ance Payn   | nent o                 | f Premium Tax                              | Cre    | edit  |  |
| 9    | Are you allo  | cating policy amount   | s with another taxpaye      | er or do you want to us   | e the alternat  | ive calc               | ulation for year of m                      | arria  | ge? See instructions.   |  |
|      | 🗌 Yes. Skip   | o to Part IV, Allocation o   | of Policy Amounts, or Part  | V, Alternative Calculation  | for Year of Mar   | riage. [               | No. Continue to                            | line   | 10.   |  |
| 10   | See the inst  | ructions to determine  | e if you can use line 11    | l or must complete line   | es 12 through   | 23.                    |  |        |   |  |
|      |   | ontinue to line 11. Co<br>ntinue to line 24.                                     | ompute your annual P        | TC. Then skip lines 12  | 2–23  | [                      |  |        | nes 12–23. Compute<br>nd continue to line 24.                                       |  |
| с    | Annual<br>alculation  |  |                             |   |   |                        | payment of PTC (Form(s)                    |        |   |  |
| 11   | Annual Totals   | 10,889.  | 10,865.                     | 7,366.  | 3,  | 499.                   | 3,499                                      |        | 10,528.   |  |
|      | Monthly<br>alculation   | (a) Monthly enrollment<br>premiums (Form(s)<br>1095-A, lines 21–32,<br>column A) |                             | (c) Monthly<br>contribution amount<br>(amount from line 8b<br>or alternative marriage<br>monthly calculation) | (d) Monthly n<br>premium ass<br>(subtract (c) fr<br>zero or less, e | sistance<br>om (b); it | credit allowed                             |        | (f) Monthly advance<br>payment of PTC (Form(s)<br>1095-A, lines 21–32,<br>column C) |  |
| 12   | January   |  |                             |   |   |                        |  |        |   |  |
| 13   | February  |  |                             |   |   |                        |  |        |   |  |
| 14   | March   |  |                             |   |   |                        |  |        |   |  |
| 15   | April   |  |                             |   |   |                        |  |        |   |  |
| 16   | May   |  |                             |   |   |                        |  |        |   |  |
| 17   | June  |  |                             |   |   |                        |  |        |   |  |
| 18   | July  |  |                             |   |   |                        |  |        |   |  |
| 19   | August  |  |                             |   |   |                        |  |        |   |  |
| 20   | September   |  |                             |   |   |                        |  |        |   |  |
| 21   | October   |  |                             |   |   |                        |  |        |   |  |
| 22   | November  |  |                             |   |   |                        |  |        |   |  |
| 23   | December  |  |                             |   |   |                        |  |        |   |  |

Total premium tax credit. Enter the amount from line 11(e) or add lines 12(e) through 23(e) and enter the total here 24 24 3,499. 10,528. 25 Advance payment of PTC. Enter the amount from line 11(f) or add lines 12(f) through 23(f) and enter the total here 25 26 Net premium tax credit. If line 24 is greater than line 25, subtract line 25 from line 24. Enter the difference here and on Schedule 3 (Form 1040), line 9. If line 24 equals line 25, enter -0-. Stop here. If line 25 is greater than line 24, leave this line blank and continue to line 27 . 26 . . . . . . Part III Repayment of Excess Advance Payment of the Premium Tax Credit

| 27 | Excess advance payment of PTC. If line 25 is greater than line 24, subtract line 24 from line 25. Enter the difference here | 27 | 7,029. |
|----|---|----|--------|
| 28 | Repayment limitation (see instructions)   | 28 |        |
| 29 | Excess advance premium tax credit repayment. Enter the smaller of line 27 or line 28 here and on Schedule 2                 |    |        |
|    | (Form 1040), line 2   | 29 | 7,029. |
|    |   |    |        |

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

Form 8962 (2023)

| Form 8962 | (2023) |
|-----------|--------|
|-----------|--------|

#### **Allocation of Policy Amounts** Complete the following information for up to four policy amount allocations. See instructions for allocation details. Allocation 1 (a) Policy Number (Form 1095-A, line 2) (b) SSN of other taxpayer (d) Allocation stop month 30 (c) Allocation start month (g) Advance Payment of the PTC Allocation percentage (f) SLCSP Percentage (e) Premium Percentage applied to monthly Percentage amounts Allocation 2 (a) Policy Number (Form 1095-A, line 2) (b) SSN of other taxpayer (c) Allocation start month (d) Allocation stop month 31 (g) Advance Payment of the PTC Allocation percentage (e) Premium Percentage (f) SLCSP Percentage applied to monthly Percentage amounts Allocation 3 (a) Policy Number (Form 1095-A, line 2) (b) SSN of other taxpayer (c) Allocation start month (d) Allocation stop month 32 (g) Advance Payment of the PTC Allocation percentage (f) SLCSP Percentage (e) Premium Percentage Percentage applied to monthly amounts Allocation 4 (a) Policy Number (Form 1095-A, line 2) (b) SSN of other taxpayer (c) Allocation start month (d) Allocation stop month 33 Allocation percentage (g) Advance Payment of the PTC (e) Premium Percentage (f) SLCSP Percentage applied to monthly Percentage amounts 34 Have you completed all policy amount allocations? Sec. Multiply the amounts on Form 1095-A by the allocation percentages entered by policy. Add all allocated policy amounts and nonallocated policy amounts from Forms 1095-A, if any, to compute a combined total for each month. Enter the combined total for each month on

lines 12-23, columns (a), (b), and (f). Compute the amounts for lines 12-23, columns (c)-(e), and continue to line 24.

**No.** See the instructions to report additional policy amount allocations.

#### Part V Alternative Calculation for Year of Marriage

Complete line(s) 35 and/or 36 to elect the alternative calculation for year of marriage. For eligibility to make the election, see the instructions for line 9. To complete line(s) 35 and/or 36 and compute the amounts for lines 12-23, see the instructions for this Part V.

| 35 | Alternative entries for your SSN                | (a) | Alternative family size | <br>Alternative monthly tribution amount | (c) | Alternative start month | (d) | Alternative stop month |
|----|---|-----|-------------------------|--|-----|-------------------------|-----|------------------------|
| 36 | Alternative entries<br>for your spouse's<br>SSN | (a) | Alternative family size | <br>Alternative monthly tribution amount | (c) | Alternative start month | (d) | Alternative stop month |
|    |   |     |                         |  |     |                         |     | Earm 8962 (20)         |

REV 01/21/24 PR RΔ

Form 8962 (2023)

FORM

# **2023** California e-file Signature Authorization for Individuals

| 202  | 23 California e-file Signature Authorization for  | Individuals   | 8879  |
|--|---|---|---|
| Your name  |   | Your SSN or I   | ΓIN   |
| NISSI  | PRASHANTH AMBATI  | 303-85-9  | 619   |
| Spouse's/RI  | DP's name   | Spouse's/RDP  | 's SSN or ITIN  |
| MOUNIS   | SHA KUNCHANGI   | 983-94-2  | 232   |
| Part I   | Fax Return Information (whole dollars only)   | l   |   |
| 1 Californ   | ia adjusted gross income (AGI). See instructions  | 1_  | 86656   |
|  | t you owe. See instructions   |   |   |
| 3 Refund   | or no amount due. See instructions  |   | 2060  |
|  | Taxpayer Declaration and Signature Authorization (Be sure you obtain and keep a copy of your retur<br>alties of perjury, I declare that I have examined a copy of my individual income tax return and accompa   | ,   |   |
| identification<br>income tax<br>and on form<br>agrees with<br>domestic p<br>provider to<br>to my ERO<br>return, I un<br>penalties. I | return originator (ERO), transmitter, or intermediate service provider, including my name, address, and<br>on number (ITIN), and the amounts shown in Part I above agree with the information and amounts shown in the applicable, I authorize an electronic funds withdrawal of the amount on line 2 and/or the estiment of the set of the | own on the corresponding<br>imated tax payments as sl<br>clare that direct deposit re<br>appointment of the other<br>ERO, transmitter, or intern<br><b>nd is delayed, I authorize</b><br><b>refund was sent.</b> If I am<br>the tax liability and all app<br>e copy of my electronic in | lines of my electronic<br>nown on my return<br>fund amount on line 3<br>spouse/registered<br>mediate service<br><b>a the FTB to disclose</b><br>filing a balance due<br>licable interest and<br>come tax return. I have |
| ·  | PIN: check one box only   |   |   |
| 🗵 I auth   | OTIZE GLOBAL TAXES LLC  | to enter my PIN   | 5 9 6 1 9   |
|  | ERO firm name   | D   | o not enter all zeros   |
| as my  | v signature on my 2023 e-filed California individual income tax return.   |   |   |
|  | enter my PIN as my signature on my 2023 e-filed California individual income tax return. Check this bo<br>n is filed using the Practitioner PIN method. The ERO must complete Part III below.   | ox <b>only</b> if you are entering  | your own PIN and your   |
| Your signat  | ture  |   |   |
| Spouse's/F   | RDP's PIN: check one box only   |   |   |
| •  | OTIZE GLOBAL TAXES LLC  | to enter my PIN   | 1 2 2 3 2   |
|  | ERO firm name   |   | not enter all zeros   |
| as my  | v signature on my 2023 e-filed California individual income tax return.   |   |   |
|  | enter my PIN as my signature on my 2023 e-filed California individual income tax return. Check to our return is filed using the Practitioner PIN method. The ERO must complete Part III below.  | this box <b>only</b> if you are   | entering your own PIN   |
| Spouse's/R   | DP's signature 🕨 Da   | te 🕨  |   |
|  | Practitioner PIN Method Returns Only continue below   |   |   |
| Part III   | Certification and Authentication — Practitioner PIN Method Only   |   |   |
|  | tronic Filer Identification Number (EFIN)/PIN.         six-digit EFIN followed by your five-digit self-selected PIN.         Do not   | 9 6 0 8 2<br>t enter all zeros  | 7 1   |
|  | at the above numeric entry is my PIN, which is my signature for the 2023 California individual income<br>at I am submitting this return in accordance with the requirements of the Practitioner PIN method and<br>ders.   |   |   |
| ERO's sign   | ature  Date   | 01/30/2024  |   |

540

# 2023 California Resident Income Tax Return

|                     |             | APE   | ATTACH FEDERAL RETURN   |
|---------------------|-------------|---|---|
| NI                  | SSI         | -85-9619 AMBA 983-94-2232<br>SIPRASHA AMBATI<br>NISHA KUNCHANGI   | 23  |
|                     |             | 75 LAKE BRIDGEPORT ST<br>MONT CA 94555  |   |
| 08                  | -08         | 08-1994 10-18-1994  |   |
| lesidence           | ۲           | Enter your county at time of filing (see instructions)          ALAMEDA         If your address above is the same as your principal/physical religions address a  |   |
| Principal Residence | ۲           | City  | Apt. no/ste. no.  |
| Filing Status       | 1<br>2<br>3 | If your California filing status is different from your federal fi I Single 4 Head 2 × Married/RDP filing jointly (even if 5 Quali only one spouse/RDP had income). See instructions. See i             | ing status, check the box here  |
|                     | 6           | 6 If someone can claim you (or your spouse/RDP) as a depend   | lent, check the box here. See instr   |
| Exemptions          |             | <ul> <li>if both are visually impaired, enter 2. See instructions</li> <li>9 Senior: If you (or your spouse/RDP) are 65 or older, enter 1; if both are 65 or older, enter 2. See instructions</li></ul> | box. If you checked<br>6, see instructions. $\bigcirc 7$ 2 X \$144 = $\bigcirc$ \$ 288<br>er 1;<br>$\bigcirc 8$ X \$144 = $\bigcirc$ \$<br>$\bigcirc 9$ X \$144 = $\bigcirc$ \$ |
|                     |             | ±/J 3   | 101234 Form 540 2023 Side 1   |

| Υοι             | ır nar   | ne:   | AMB                               | ATI                 | Γ   | Your SSN o       | or ITIN:    | 303-8              | 35-9619           |           |                 |       |              |
|-----------------|----------|---|-----------------------------------|---------------------|---|------------------|-------------|--------------------|-------------------|-----------|-----------------|-------|--------------|
|                 | 10 I     | Depen   | dents:                            |                     | ot include yourself or yo<br>Dependent 1                  | our spouse/RD    |             | ndent 2            |                   |           | Dependent 3     |       |              |
|                 |          | First   | Name                              | $oldsymbol{igstar}$ |   |                  | • Dehe      |                    |                   |           |                 |       |              |
| s               |          | Last  | Name                              |                     |   |                  | •           |                    |                   |           | ,               |       |              |
| ption           |          |   | . See                             |                     |   |                  |             |                    |                   |           |                 |       |              |
| Exemptions      |          | Depe  | ructions.<br>endent's<br>tionship | •                   |   |                  | •           |                    |                   |           |                 |       |              |
|                 |          | to yo   | ou .                              | 0                   |   |                  |             |                    |                   |           |                 |       |              |
|                 | Tota     | l depei   | ndent e                           | xemp                | otions  |                  |             |                    | 10 X              | \$446 = 🤇 | \$              |       |              |
|                 | 11       | Exem  | nption a                          | imou                | Int: Add line 7 through li                                | ne 10. Transfe   | r this amo  | ount to lin        | e 32              | • 1       | 1\$             | 28    | 88           |
|                 | 12       | State<br>Form   | wages<br>I(s) W-2                 | from<br>2, box      | n your federal<br>x 16                                    | • 1              | 2           |                    | 103545            | . 00      |                 |       |              |
|                 | 13       | Enter   | federa                            | l adju              | usted gross income from                                   | federal Form     | 1040 or 1   | 040-SR,            | ine 11            | . 🖲 13    |                 | 86656 | . 00         |
|                 | 14       |   |                                   |                     | nents – subtractions. En<br>Iumn B                        |                  |             |                    |                   | . • 14    |                 | 0     | . 00         |
| e               | 15       | Subt  | ract line                         | 14 f                | from line 13. If less than                                | zero, enter the  | e result in | parenthe           | ses.              |           |                 | 86656 | . 00         |
| ncom            | 16       |   |                                   |                     |   |                  |             |                    |                   |           |                 |       |              |
| Taxable Income  | 17       |   |                                   |                     | ed gross income. Combii                                   |                  |             |                    |                   |           |                 | 86656 | .00          |
| Тах             | 17<br>18 |   | (                                 |                     | r California <b>itemized ded</b>                          |                  |             |                    |                   | ```       |                 |       | ∎ <u> 00</u> |
|                 | 10       | larger of Your California standard deduction shown below for your filing status:  |                                   |                     |   |                  |             |                    |                   |           |                 |       |              |
|                 |          | <ul> <li>Single or Married/RDP filing separately\$5,363</li> <li>Married/RDP filing jointly, Head of household, or Qualifying surviving spouse/RDP. \$10,726</li> </ul> |                                   |                     |   |                  |             |                    |                   |           |                 |       |              |
|                 | 19       | Subt  |                                   |                     | arried/RDP filing separately<br>from line 17. This is you |                  |             | ked, <b>STOP</b> . | See instructions. | • 18      |                 | 10726 | . 00         |
|                 | 15       |   |                                   |                     |   | • 19             |             |                    |                   |           |                 | 75930 | . 00         |
|                 |          |   |                                   |                     | X Tay   | Table            | Тах         | Rate Sch           | edule             |           |                 |       |              |
|                 | 31       | Tax. (  | Check t                           | he bo               | ox if from:   | 3800             |             |                    |                   | - 01      |                 | 1840  | . 00         |
|                 | 32       |   |                                   |                     | s. Enter the amount fron                                  | n line 11. If yo | ur federal  | AGI is mo          | ore than          | ••••      |                 | 288   |              |
| Тах             |          | \$237   | ,035, se                          | e ins               | structions  |                  |             |                    |                   | . 🖲 32    |                 |       | • 00         |
|                 | 33       | Subt  | ract line                         | 32 f                | from line 31. If less than                                | zero, enter -0-  | •           |                    | ·····             | . 🖲 33    |                 | 1552  | • 00         |
|                 | 34       | Tax. S  | See inst                          | ructi               | ions. Check the box if fro                                | om: • So         | chedule G   | -1 •               | FTB 5870A         | • 34      |                 |       | <b>.</b> 00  |
|                 | 35       | Add I   | line 33 a                         | and li              | ine 34  |                  |             |                    |                   | . 🖲 35    |                 | 1552  | . 00         |
| Its             | 40       | Nonr  | ofundat                           |                     | hild and Dependent Care                                   | Evnences Cro     | dit Soo ir  | netruction         |                   | • 10      |                 |       | . 00         |
| Credi           |          |   |                                   |                     |   | Expenses ore     |             |                    |                   |           |                 |       |              |
| Special Credits | 43       |   | credit                            |                     |   |                  | code ●      |                    | and amount        |           |                 | ]     | .00          |
| Sp              | 44       | Enter   | credit                            | name                | e   |                  | code ●      |                    | and amount        | . • 44    | REV 01/21/24 PR | 0     | • 00         |
|                 | :        | Side 2  | . Form                            | 540                 | 2023  | 175              | 310         | 2234               |                   | •         |                 |       |              |

| You                  | ır nar   | me: AMBATI  | Your SSN or ITIN:         | 303-85-9619       |                  |                    |        |              |  |  |  |
|----------------------|----------|---|---------------------------|-------------------|------------------|--------------------|--------|--------------|--|--|--|
| s                    | 45       | To claim more than two credits, see instru  | uctions. Attach Schedule  | P (540)           | . • 45           |                    |        | . 00         |  |  |  |
| Special Credits      | 46       | Nonrefundable Renter's Credit. See instru   | ctions                    |                   | . • 46           |                    |        | . 00         |  |  |  |
| ecial (              | 47       | Add line 40 through line 46. These are yo   | . • 47                    |                   |                  | . 00               |        |              |  |  |  |
| Spe                  | 48       | Subtract line 47 from line 35. If less than   | zero, enter -0            |                   | . • 48           |                    | 1552   | . 00         |  |  |  |
|                      |          |   | D (540)                   |                   |                  |                    |        | . 00         |  |  |  |
| ixes                 | 61       | Alternative Minimum Tax. Attach Schedul   | Г                         |                   |                  |                    |        |              |  |  |  |
| Other Taxes          | 62       | Mental Health Services Tax. See instruction   |                           |                   | Γ                |                    |        | • 00         |  |  |  |
| ō                    | 63       | Other taxes and credit recapture. See inst  |                           |                   | Γ                |                    | 1 0    | • 00         |  |  |  |
|                      | 64       | Add line 48, line 61, line 62, and line 63.   | This is your total tax    |                   | . ● 64           |                    | 1552   | • 00         |  |  |  |
|                      | 71       | California income tax withheld. See instru  | ictions                   |                   | . • 71           |                    | 3612   | . 00         |  |  |  |
|                      | 72       | 2023 California estimated tax and other p   | ayments. See instructior  | IS                | . • 72           |                    |        | . 00         |  |  |  |
|                      | 73       | Withholding (Form 592-B and/or Form 59  | 93). See instructions     |                   | . • 73           |                    |        | . 00         |  |  |  |
| Payments             | 74       |   |                           |                   |                  |                    |        |              |  |  |  |
| Payn                 | 75       | Earned Income Tax Credit (EITC). See ins  | . • 75                    |                   |                  | . 00               |        |              |  |  |  |
|                      | 76       | Young Child Tax Credit (YCTC). See instru   |                           |                   | . 00             |                    |        |              |  |  |  |
|                      | 77<br>78 | Foster Youth Tax Credit (FYTC). See instru<br>Add line 71 through line 77. These are yo<br>See instructions                           | ur total payments.        |                   | Г                |                    | 3612   | • 00<br>• 00 |  |  |  |
| Тах                  | 91       | <b>Use Tax.</b> Do not leave blank. See instruct  | ions                      | • 91              |                  | 0.00               |        |              |  |  |  |
| Use Tax              |          | If line 91 is zero, check if: $\odot$ X No  | use tax is owed. 💿        | You paid your use | e tax obligation | directly to CDTFA. |        |              |  |  |  |
| ISR<br>Penaltv       | 92       | If you and your household had full-year h<br>See instructions. Medicare Part A or C co<br>If you did not check the box, see instructi | verage is qualifying heal |                   | . • X            |                    |        |              |  |  |  |
| ے<br>م               |          | Individual Shared Responsibility (ISR) Pe   | nalty. See instructions . | • 92              |                  | _ 00               |        |              |  |  |  |
| le                   | 93       | Payments balance. If line 78 is more than   | line 91, subtract line 91 | from line 78      | . • 93           |                    | 3612   | . 00         |  |  |  |
| lax Dı               | 94       | Use Tax balance. If line 91 is more than I  |                           |                   | . • 94           |                    |        | . 00         |  |  |  |
| Tax/J                | 95       | Payments after Individual Shared Respon<br>subtract line 92 from line 93  | . • 95                    |                   | 3612             | . 00               |        |              |  |  |  |
| Overpaid Tax/Tax Due | 96       | Individual Shared Responsibility Penalty E subtract line 93 from line 92  | . • 96                    |                   |                  | . 00               |        |              |  |  |  |
| ŇŎ                   | 97       | Overpaid tax. If line 95 is more than line 6  | 64, subtract line 64 from | line 95           | . • 97           |                    | 2060   | . 00         |  |  |  |
|                      |          | REV 01/21/24 PRO  |                           |                   | _                |                    |        |              |  |  |  |
|                      |          |   | 175 3103                  | 3234              |                  | Form 540 2023      | Side 3 |              |  |  |  |

| our nai                         | me:    | AMBATI                                    | Your SSN or ITIN:            | 303-85-9619                      |             |        |      |
|---------------------------------|--------|---|------------------------------|----------------------------------|-------------|--------|------|
| e 98                            | Amo    | unt of line 97 you want applied to yo     | ur <b>2024</b> estimated tax |                                  | 98          | 0.     | . 00 |
| Tax/Tax Due<br>66<br>001<br>001 | Over   | paid tax available this year. Subtract    | ine 98 from line 97          |                                  | 99          | 2060   | . 00 |
| ,<br>×<br>100 ⊐                 | Tax o  | lue. If line 95 is less than line 64, sub | tract line 95 from line      | 64                               | ) 100       |        | . 00 |
|                                 |        |   |                              |                                  | <u>Code</u> | Amount |      |
|                                 | Califo | ornia Seniors Special Fund. See instru    | ictions                      | •••••••••••••••••••••••••••••••• | 400         |        | . 00 |
|                                 | Alzhe  | imer's Disease and Related Dementia       | ı Voluntary Tax Contrib      | oution Fund                      | 401         |        | . 00 |
|                                 | Rare   | and Endangered Species Preservatio        | n Voluntary Tax Contri       | bution Program                   | 403         |        | . 00 |
|                                 | Califo | ornia Breast Cancer Research Volunta      | ry Tax Contribution Fu       | nd                               | 405         |        | . 00 |
|                                 | Califo | ornia Firefighters' Memorial Voluntary    | Tax Contribution Fund        | d                                | 406         |        | . 00 |
|                                 | Emer   | gency Food for Families Voluntary Ta      | x Contribution Fund .        |                                  | 407         |        | . 00 |
|                                 | Califo | ornia Peace Officer Memorial Founda       | ion Voluntary Tax Con        | tribution Fund                   | 408         |        | . 00 |
|                                 | Califo | ornia Sea Otter Voluntary Tax Contrib     | ution Fund                   |                                  | 410         |        | . 00 |
|                                 | Califo | ornia Cancer Research Voluntary Tax       | Contribution Fund            |                                  | 413         |        | . 00 |
| COLICI IDULIO                   | Scho   | ol Supplies for Homeless Children Vo      | oluntary Tax Contribution    | on Fund                          | 422         |        | . 00 |
| 3                               | State  | Parks Protection Fund/Parks Pass P        | urchase                      |                                  | 423         |        | . 00 |
|                                 | Prote  | ct Our Coast and Oceans Voluntary 1       | ax Contribution Fund.        |                                  | 424         |        | . 00 |
|                                 | Кеер   | Arts in Schools Voluntary Tax Contri      | bution Fund                  |                                  | 425         |        | . 00 |
|                                 | Califo | ornia Senior Citizen Advocacy Volunta     | ry Tax Contribution Fu       | nd                               | 438         |        | . 00 |
|                                 | Nativ  | e California Wildlife Rehabilitation Vo   | luntary Tax Contributio      | on Fund                          | 439         |        | . 00 |
|                                 | Rape   | Kit Backlog Voluntary Tax Contributi      | on Fund                      |                                  | 440         |        | . 00 |
|                                 | Suici  | de Prevention Voluntary Tax Contribu      | tion Fund                    |                                  | 444         |        | . 00 |
|                                 | Ment   | al Health Crisis Prevention Voluntary     | Tax Contribution Fund        |                                  | 445         |        | . 00 |
| 110                             | Add    | amounts in code 400 through code 4        | 45. This is your total c     | ontribution                      | 110         |        | . 00 |

REV 01/21/24 PRO

| Your                          |  | ne:            | AMBATI                |                            |  | Your SSN or ITIN:   | 303-85-       | -9619                    |                   |  |              |  |  |
|-------------------------------|--|----------------|-----------------------|----------------------------|--|---|---------------|--------------------------|-------------------|--|--------------|--|--|
| Amount<br>You Owe             | 111  | Mail           | to: FRANCH            | ISE TAX                    | BOARD, PO B                            | amount on line 99, add li<br><b>30X 942867, SACRAMEI</b><br>ore information.                        |               |                          |                   | ee instructions. <b>Do not send cash.</b>  | . 00         |  |  |
| Interest and<br>Penalties     | 113  | Unde<br>Chec   | erpayment of e        | estimated                  | l tax.<br>B 5805 attacl                | yment penalties<br>ned • FTB 5805<br>ose, but do not staple, ar                                     | F attached .  |                          | 112<br>113<br>114 |  | • 00<br>• 00 |  |  |
|                               | <b>115 REFUND OR NO AMOUNT DUE.</b> Subtract the sum of line 110, line 112, and line 113 from line 99. See instructions. |                |                       |                            |  |   |               |                          |                   |  |              |  |  |
|                               |  |                |                       |                            |  | X 942840, SACRAMENT   |               |                          |                   | 2060   | . 00         |  |  |
| Refund and Direct Deposit     |  | See i<br>All o | nstructions. <b>H</b> | lave you<br>amount<br>• Ty | verified the ro<br>of my refund<br>ype | deposit of your refund in<br>outing and account num<br>(line 115) is authorized<br>• Account number | ibers? Use w  | hole dollars onl         | у.                | <ul> <li>a voided check or a deposit slip.</li> <li>bwn below:</li> <li>116 Direct deposit amount</li> </ul> |              |  |  |
| d and [                       |  |                | 2100035               |                            | Checking<br>Savings                    | 32508940515   | 2             |                          |                   | 2060   | . 00         |  |  |
| Refun                         |  | The r          | remaining amo         | ount of m                  | iy refund (line                        | 115) is authorized for d  | irect deposit | into the accoun          | it shown          | below:   |              |  |  |
|                               |  | • F            | louting numbe         |                            | Checking                               | Account number  |               | •                        |                   | • 117 Direct deposit amount  |              |  |  |
|                               |  |                |                       |                            | Savings                                |   |               |                          |                   |  | . 00         |  |  |
| Voter Info.                   |  | For v          | voter registrati      | on inforn                  | nation, check                          | the box and go to <b>sos.ca</b>   | a.gov/electio | <b>ns</b> . See instruct | tions             |  |              |  |  |
| Health Care<br>Coverage Info. |  | -              |                       |                            |  | ow-cost health care cove<br>your tax return with Co   |               | •                        |                   |  | No           |  |  |

REV 01/21/24 PRO

Sign your tax return on Side 6

175

Г

| Your | name: | AME |
|------|-------|-----|
|      |       |     |

Γ

| Your | N22 | ٥r | ITINI |  |
|------|-----|----|-------|--|
| TUUL |     | UL |       |  |

303-85-9619



| IMPORTANT:                          | See the instructions to find out if you should attach a copy of your complete federal tax return.  |                |                             |  |  |  |  |  |
|-------------------------------------|--|----------------|-----------------------------|--|--|--|--|--|
|                                     | can be found in annual tax booklets or online. Go to <b>ftb.ca.gov/privacy</b> to learn about our privacy policy statement, or go<br>1 EN-SP, Franchise Tax Board Privacy Notice on Collection. To request this notice by mail, call 800.338.0505 and enter forr |                |                             |  |  |  |  |  |
| Under penalties is true, correct, a | of perjury, I declare that I have examined this tax return, including accompanying schedules and statements, and to t<br>nd complete.  | he best of m   | ny knowledge and belief, it |  |  |  |  |  |
| Your signature                      | Date Spouse's/RDP's signature (if  | a joint tax re | turn, both must sign)       |  |  |  |  |  |
|                                     | • Your email address. Enter only one email address.  | Prefe          | erred phone number          |  |  |  |  |  |
| Sign                                |  | 5104           | 1581817                     |  |  |  |  |  |
| Here                                | Paid preparer's signature (declaration of preparer is based on all information of which preparer has any knowledge)  |                |                             |  |  |  |  |  |
|                                     | SYAM PRIYA RAM SAGAR GUPTA TALLAM  |                |                             |  |  |  |  |  |
| It is unlawful<br>to forge a        | Firm's name (or yours, if self-employed)   |                | PTIN                        |  |  |  |  |  |
| spouse's/<br>RDP's<br>signature.    | GLOBAL TAXES LLC   |                | P02082703                   |  |  |  |  |  |
| 0                                   | Firm's address   |                | ● Firm's FEIN               |  |  |  |  |  |
| Joint tax<br>return?                | 245 ROONEY CT E BRUNSWICK NJ 08816   |                | 843171965                   |  |  |  |  |  |
| See instructions.                   | Do you want to allow another person to discuss this tax return with us? See instructions   | Yes            | × No                        |  |  |  |  |  |
|                                     | Print Third Party Designee's Name  | Telephor       | ne Number                   |  |  |  |  |  |
|                                     |  |                |                             |  |  |  |  |  |

REV 01/21/24 PRO

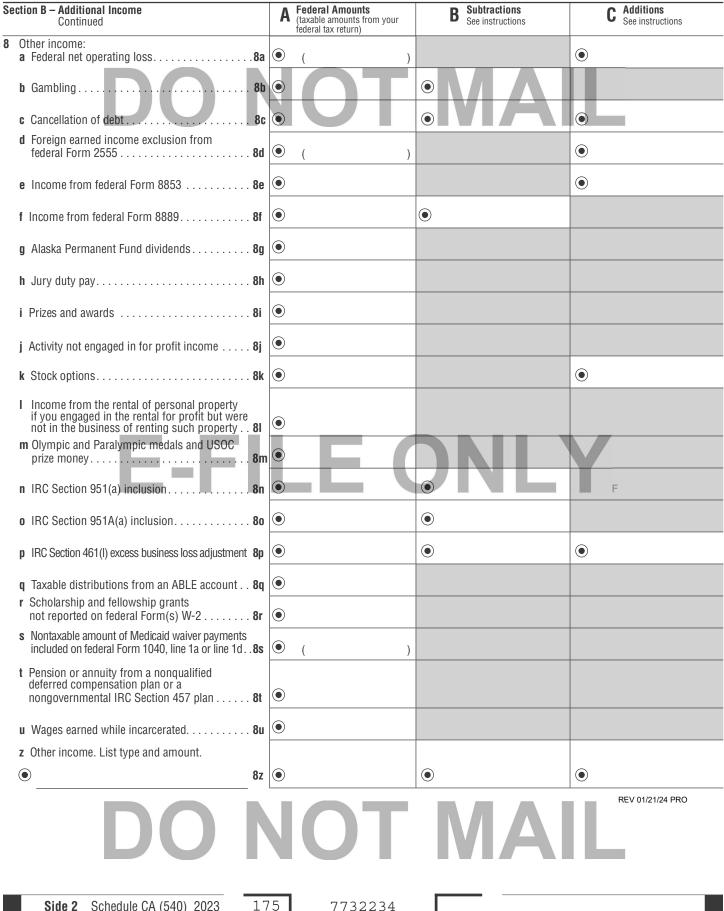
CA (540)

# **2023 California Adjustments — Residents**

Important: Attach this schedule behind Form 540, Side 6 as a supporting California schedule.

| Na              | me(s) as shown on tax return   |  |   | SSN or ITIN                            |
|-----------------|--|--|---|--|
| Ν               | AMBATI & M KUNCHANGI   |  |   | 303859619                              |
| <b>Pa</b><br>Se | rt I Income Adjustment Schedule<br>ction A – Income from federal Form 1040 or 1040-SR  | A Federal Amounts<br>(taxable amounts from your<br>federal tax return) | <b>B</b> Subtractions<br>See instructions | <b>C</b> Additions<br>See instructions |
| 1               | a Total amount from federal<br>Form(s) W-2, box 1. See instructions 1a                 |  |   | •                                      |
|                 | b Household employee wages not reported<br>on federal Form(s) W-2 1b                   | •  | ۲   | ۲                                      |
|                 | c Tip income not reported on line 1a 1c  | ۲  | ۲   | •                                      |
|                 | d Medicaid waiver payments not reported<br>on federal Form(s) W-2. See instructions 1d | ۲  | ۲   | ۲                                      |
|                 | e Taxable dependent care benefits from federal Form 2441, line 261e                    | ۲  | ۲   | •                                      |
|                 | f Employer-provided adoption benefits<br>from federal Form 8839, line 29 1f            | ۲  | ۲   | ۲                                      |
|                 | <b>g</b> Wages from federal Form 8919, line 6 <b>1</b> g                               | ۲  | ۲   | ۲                                      |
|                 | h Other earned income. See instructions 1h   | • 0  | $\odot$                                   | $\odot$                                |
|                 | i Nontaxable combat pay election.<br>See instructions1i                                |  |   | ۲                                      |
|                 | z Add line 1a through line 1i1z  | • 103545   | ۲   | ۲                                      |
| 2               | Taxable interest. a 🔍 2b   | ۲  | $\odot$                                   |  |
| 3               | Ordinary dividends.<br>See instructions. <b>a</b> • 3b                                 | •  |   | ۲                                      |
| 4               | IRA distributions.<br>See instructions. a 4b   |  |   | • F                                    |
| 5               | Pensions and<br>annuities. See<br>instructions. <b>a</b> • <b>5b</b>                   | $\odot$  |   | ۲                                      |
| 6               | instructions. a • 5b<br>Social security  |  |   |  |
| U               | benefits. a • 6b   | ۲  |   |  |
|                 | Capital gain or (loss). See instructions   | •  | ۲   | ۲                                      |
|                 | ction B – Additional Income from federal Schedule 1                                    | (Form 1040)  |   |  |
| 1               | Taxable refunds, credits, or offsets of state and local income taxes                   | • 0  | • 0                                       |  |
| 2               | a Alimony received. See instructions 2a  | ۲  |   | ۲                                      |
| 3               | Business income or (loss). See instructions <b>3</b>                                   | ۲  | ۲   | ۲                                      |
|                 | Other gains or (losses)4   | ۲  | ۲   | ۲                                      |
| 5               | Rental real estate, royalties, partnerships,<br>S corporations, trusts, etc            | • -16889   | ۲   | ۲                                      |
| 6               | Farm income or (loss)  |  |   | •                                      |
| 7               | Unemployment compensation  |  |   |  |
|                 |  |  |   | REV 01/21/24 PRO                       |

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| Se | ction B – Additional Income<br>Continued  | A                   | Federal Amounts<br>(taxable amounts from your<br>federal tax return) | В       | Subtractions<br>See instructions | C Additions<br>See instructions |
|----|---|---------------------|--|---------|----------------------------------|---------------------------------|
| 9  | a Total other income. Add lines 8a through 8z 9a  | $oldsymbol{igodol}$ |  | ۲       |                                  | $\odot$                         |
|    | b1 Disaster loss deduction from form FTB 3805V 9b1  |                     | OT   | •       | ΛΛΙ                              |                                 |
|    | b2 NOL deduction from form FTB 3805V 9b2  |                     |  | $\odot$ |                                  |                                 |
|    | <b>b3</b> NOL deduction from form FTB 3805Z, 3807, or 3809  |                     |  | ۲       |                                  |                                 |
| 10 | <b>Total.</b> Combine Section A, line 1z through line 7,<br>and Section B, line 1 through line 7, and line 9a<br>in column A and column C. Add Section A, line 1z<br>through line 7, and Section B, line 1 through line 7,<br>line 9a, and line 9b1 through line 9b3 in column B<br>(as applicable). See instructions | ۲                   | 86656  | ۲       | 0                                | ۲                               |
|    | <b>stion C – Adjustments to Income</b><br>m federal Schedule 1 (Form 1040)  |                     |  |         |                                  |                                 |
|    | ·   | $oldsymbol{igstar}$ |  |         |                                  |                                 |
| 12 | Certain business expenses of reservists, performing artists, and fee-basis government officials <b>12</b>   | ullet               |  |         |                                  | $\odot$                         |
|    | 0   |                     |  | ۲       |                                  |                                 |
| 14 | Moving expenses. Attach form FTB 3913.<br>See instructions <b>14</b>  | $oldsymbol{igodol}$ |  |         |                                  |                                 |
| 15 | Deductible part of self-employment tax.<br>See instructions   | $oldsymbol{O}$      |  | 0       |                                  |                                 |
| 16 | Self-employed SEP, SIMPLE, and qualified plans16  | $oldsymbol{O}$      |  |         |                                  |                                 |
| 17 | Self-employed health insurance deduction.<br>See instructions   | $   \mathbf{O} $    |  | •       |                                  | F                               |
| 18 | Penalty on early withdrawal of savings  |                     |  |         |                                  |                                 |
| 19 | a Alimony paid  |                     |  |         |                                  | ۲                               |
|    | <b>b</b> Recipient's: SSN •   |                     |  |         |                                  |                                 |
|    | Last Name 🖲   |                     |  |         |                                  |                                 |
| 20 | IRA deduction   |                     |  | ۲       |                                  | ۲                               |
| 21 | Student loan interest deduction   |                     |  |         |                                  | ۲                               |
| 22 | Reserved for future use   |                     |  |         |                                  |                                 |
| 23 | Archer MSA deduction  |                     |  |         |                                  |                                 |
|    |   | _                   |  | _       |                                  | REV 01/21/24 PRO                |

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175

| ection C – Adjustments to Income<br>Continued   | A                   | Federal Amounts<br>(taxable amounts from your<br>federal tax return) | В                    | Subtractions<br>See instructions | <b>C</b> Additions<br>See instructions |
|---|---------------------|--|----------------------|----------------------------------|--|
| 4 Other adjustments:<br>a Jury duty pay24a  | $oldsymbol{igodol}$ |  |                      |                                  |  |
| <b>b</b> Deductible expenses related to income reported<br>on line 8I from the rental of personal property<br>engaged in for profit <b>24b</b> (                      |                     | ΟΤ   |                      |                                  | •                                      |
| <b>c</b> Nontaxable amount of the value of Olympic and<br>Paralympic medals and USOC prize money<br>reported on line 8m <b>24c</b>                                    | $   \overline{} $   |  | •                    |                                  |  |
| d Reforestation amortization and expenses24d  |                     |  |                      |                                  |  |
| <b>e</b> Repayment of supplemental unemployment benefits under the federal Trade Act of 1974 <b>24e</b>   | •                   |  |                      |                                  |  |
| f Contributions to IRC Section 501(c)(18)(D)<br>pension plans   | •                   |  | $\overline{\bullet}$ |                                  |  |
| <b>g</b> Contributions by certain chaplains to IRC Section 403(b) plans   | •                   |  | •                    |                                  | •                                      |
| h Attorney fees and court costs for actions involving certain unlawful discrimination claims 24h  |                     |  |                      |                                  |  |
| i Attorney fees and court costs you paid in connection<br>with an award from the IRS for information you provided<br>that helped the IRS detect tax law violations24i |                     |  | ۲                    |                                  |  |
| j Housing deduction from federal Form 2555 <b>24</b> j  | $oldsymbol{O}$      |  |                      |                                  |  |
| <b>k</b> Excess deductions of IRC Section 67(e) expenses from federal Schedule K-1 (Form 1041)24k   |                     |  |                      |                                  |  |
| z Other adjustments. List type and amount.  | •                   | FC   |                      |                                  | 0                                      |
| 5 Total other adjustments. Add line 24a through line 24z  |                     |  | $\odot$              |                                  | • F                                    |
| 6 Add line 11 through line 23 and line 25 in columns A, B, and C. See instructions  | $   \overline{} $   |  |                      |                                  | $\odot$                                |
| 7 Total. Subtract line 26 from line 10 in columns A, B, and C. See instructions   |                     | 86656  | ۲                    | 0                                | ۲                                      |

REV 01/21/24 PRO



### Part II Adjustments to Federal Itemized Deductions

| Ch | eck the box if you did NOT itemize for federal but will ite   | emize       | for California 🕥  |   |   |
|----|---|-------------|---|---|---|
|    |   |             | A Federal Amounts<br>(from federal Schedule A<br>(Form 1040)) | <b>B</b> Subtractions<br>See instructions | C Additions<br>See instructions         |
| Me | dical and Dental Expenses See instructions.   |             |   |   |   |
| 1  | Medical and dental expenses   | 1           |   |   |   |
| 2  | Enter amount from<br>federal Form 1040<br>or 1040-SR, line 11 • 86656   | 2           |   |   |   |
| 3  | Multiply line 2<br>by 7.5% (0.075) • 6499   | _           |   |   |   |
| 4  | Subtract line 3 from line 1.<br>If line 3 is more than line 1, enter 0  |             | • 890   |   | • 0                                     |
|    | <b>a</b> State and local income tax or general sales taxes  | 5 <b>5a</b> | • 4544  | • 45                                      | 544                                     |
|    | <b>b</b> State and local real estate taxes  | 5b          | ۲   |   |   |
|    | ${\bf c}~$ State and local personal property taxes $\ldots\ldots\ldots$   | 5c          | ۲   |   |   |
|    | <b>d</b> Add line 5a through line 5c  | 5d          | • 4544         •         •         •                          |   |   |
|    | e Enter the smaller of line 5d or \$10,000 (\$5,000 i<br>married filing separately) in column A.<br>Enter the amount from line 5a, column B<br>in line 5e, column B.<br>Enter the difference from line 5d and line 5e,<br>column A in line 5e, column C | l           | • 4544  | 6 45                                      | 544 • • • • • • • • • • • • • • • • • • |
| 6  | Other taxes. List type 🖲  | _ 6         | ۲   | ۲   | ۲                                       |
| 7  | Add line 5e and line 6  | 7           | • 4544         •  | • 45                                      | 0<br>0<br>0<br>0<br>0                   |
|    | <ul> <li>a Home mortgage interest and points reported to you on federal Form 1098</li> </ul>  | <b>8</b> a  | ۲   |   |   |
|    | <b>b</b> Home mortgage interest not reported to you on federal Form 1098  | 8b          | ۲   |   | ۲                                       |
|    | c Points not reported to you on federal Form 1098   | 8c          | ۲   |   | •                                       |
|    | <b>d</b> Reserved for future use  | 8d          |   |   |   |
|    | e Add line 8a through line 8c   | 8e          | ۲   | ۲   | ۲                                       |
| 9  | Investment interest   | 9           | ۲   | ۲   | ۲                                       |
| 10 | Add line 8e and line 9  | .10         | ۲   | ۲   | ۲                                       |
|    | DO  |             |   | MA  | REV 01/21/24 PRO                        |
|    | 1   | 75          | 7735234   | Schedu                                    | le CA (540) 2023 Side 5                 |



| Pa  | rt II Adjustments to Federal Itemized Deductions<br>Continued   | A               | Federal Amounts<br>(from federal Schedule A<br>(Form 1040)) |                | btractions<br>e instructions            | C               | Additions<br>See instructions |
|-----|---|-----------------|---|----------------|---|-----------------|-------------------------------|
| Gif | ts to Charity   |                 |   |                |   |                 |                               |
|     | Gifts by cash or check  |                 |   |                |   | $\odot$         |                               |
| 12  | Other than by cash or check   | •               | OT  |                | Δ                                       | ۲               |                               |
| 13  | Carryover from prior year13   | $\odot$         |   |                |   | ۲               |                               |
|     | Add line 11 through line 1314   | ۲               |   | ۲              |   | ۲               |                               |
|     | casualty and Theft Losses<br>Casualty or theft loss(es) (other than net qualified disaster<br>losses). Attach federal Form 4684. See instructions15                           |                 |   | ۲              |   |                 |                               |
| Oth | er Itemized Deductions  |                 |   |                |   |                 |                               |
| 16  | Other—from list in federal instructions16   | $\odot$         |   | $\odot$        |   |                 |                               |
| 17  | Add lines 4, 7, 10, 14, 15, and 16 in columns A, B, and C <b>17</b>   |                 | 5434  |                | 4544                                    |                 | 0                             |
|     |   | 1               |   | 1              |   |                 |                               |
| 18  | Total. Combine line 17 column A less column B plus co   | lumn            | С   |                | ••••••••••••••••••••••••••••••••••••••• | ) 18            | 890                           |
| Job | Expenses and Certain Miscellaneous Deductions   |                 |   |                |   |                 |                               |
| 19  | Unreimbursed employee expenses: job travel, union due Attach federal Form 2106 if required. See instructions .  |                 |   | ) 19           |   |                 |                               |
| 20  | Tax preparation fees  |                 |   | ) <b>20</b>    |   |                 |                               |
|     | Other expenses: investment, safe deposit<br>box, etc. List type   |                 |   | 21             | 0                                       |                 |                               |
|     | Add line 19 through line 21   |                 |   | 22             | 0                                       | Y .             |                               |
| 23  | Enter amount from federal Form 1040<br>or 1040-SR, line 11  |                 | 86656   |                |   |                 |                               |
| 24  | Multiply line 23 by 2% (0.02). If less than zero, enter 0.  |                 |   | ) 24           | 1733                                    |                 |                               |
| 25  | Subtract line 24 from line 22. If line 24 is more than line   | 22, 6           | enter O   |                |   | <sup>)</sup> 25 | 0                             |
| 26  | Total Itemized Deductions. Add line 18 and line 25  |                 |   |                |   | <sup>)</sup> 26 | 890                           |
| 27  | Other adjustments. See instructions. Specify.   |                 |   |                |   | 27              |                               |
| 28  | Combine line 26 and line 27   |                 |   |                |   | 28              | 890                           |
| 29  | Is your federal AGI (Form 540, line 13) more than the<br>Single or married/RDP filing separately<br>Head of household<br>Married/RDP filing jointly or qualifying surviving s |                 | · · · · · · · · · · · · · · · · · · ·                       | . \$237,035    | ,                                       |                 |                               |
|     | No. Transfer the amount on line 28 to line 29.  |                 |   |                | <u> </u>                                |                 |                               |
|     | Yes. Complete the Itemized Deductions Worksheet in th   | e inst          | tructions for Schedule CA                                   | (540), line 29 | )                                       | <sup>)</sup> 29 | 890                           |
| 30  | Enter the larger of the amount on line 29 or your stand<br>Single or married/RDP filing separately. See instru<br>Married/RDP filing jointly, head of household, or qu        | ction<br>alifyi | sng surviving spouse/RDP                                    | \$10,726       | A                                       |                 | 1                             |
|     | Transfer the amount on line 30 to Form 540, line 18   |                 |   |                |   | 30              | 10726                         |
|     |   |                 |   |                | REV 01/21/24 PRO                        |                 |                               |
|     | <b>Side 6</b> Schedule CA (540) 2023 175  | 1               | 7736234   |                |   |                 |                               |