Form **8879**

(Rev. January 2021)

Department of the Treasury Internal Revenue Service

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

► Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

| Social securit | y number | |
|--|---|---|
| 627-93- | -7506 | |
| Spouse's soci | ial security number | |
| nter year you a | re authorizing.) | |
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| | 1 93, | 458. |
| | 2 12, | 825. |
| | 3 19, | 770. |
| | 4 6, | 945. |
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| | spouse's social spouse's | am now authorizing and, if application approximate my PIN Enter five digits, but don't enter all zeros am now authorizing. Check this be method. The ERO must complete Ellow 1 2 12, 3 19, 4 6, 5 Ind keep a copy of your return and the processing of the designated or rejection of the transmission, (b) the he U.S. Treasury and its designated Fit indicated in the tax preparation soft titution to debit the entry to this account the payment. I further acknowledge and the payment. I further acknowledge and I am now authorizing and, if application are mow authorizing. Check this because of the electronic pay the payment. I further acknowledge and I am now authorizing. Check this because of the electronic pay the payment. I further acknowledge and I am now authorizing. Check this because of the electronic pay the payment. I further all zeros are now authorizing. Check this because of the electronic pay the payment. The enter all zeros are now authorizing. Check this because of the electronic pay the payment and the electronic pay the payment. I further all zeros are now authorizing. Check this because of the electronic pay the payment and the payment and the electronic pay the payment. I further acknowledge and the electronic pay the payment. I further acknowledge and the electronic pay the payment. I further acknowledge and the electronic pay the payment. I further acknowledge and the electronic pay the payment. I further acknowledge and the electronic pay the payment. I further acknowledge and the electronic payment. I further all the electronic payment. I further all the |

Don't Submit This Form to the IRS Unless Requested To Do So

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



| 1040 | | artment of the Treasury—Internal Revenue Servi | | urn | 202 | 3 | OMB No. 1545 | -0074 | IRS Use | Only- | -Do not w | rite or sta | aple in this space. |
|-------------------------------|----------|--|---|---|----------------|-------|------------------|----------|-----------------|-----------------|---------------------|-------------|--------------------------------|
| For the year Jar | n. 1–Dec | c. 31, 2023, or other tax year beginning | | | , 2023, end | ling | | | , 20 | Ť | See se | parate i | instructions. |
| Your first name | e and m | iddle initial | Last na | me | | | | | | | Your so | cial sec | curity number |
| SHOBHIT | НА | | SARA | В | | | | | | | 627 | 93 | 7506 |
| | | s first name and middle initial | Last na | | | | | | | | | | security number |
| Homo addroso | /numb | or and atract). If you have a D.O. have acco | inatruati | 000 | | | | | Apt. no. | | Did. | | |
| 3 S PINI | | er and street). If you have a P.O. box, see | HISHUCH | UIIS. | | | | | 105 | - 1 | | | ection Campaigr ou, or your |
| | | ce. If you have a foreign address, also co | mplete s | paces belo | ow. | Sta | te | ZIP c | | | | | jointly, want \$3 |
| FORT LA | | | | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | FI | | 333 | | | • | | nd. Checking a |
| Foreign countr | | | | Foreian pr | ovince/state/ | | | | n postal c | | your tax | | not change ind. |
| J | , | | | 0 1 | | | • | , | | | , | Yo | |
| Filing Status | s 🗵 | Single | • | | | | Head of h | ouseh | old (HOI | - 1) | | | |
| Check only | | Married filing jointly (even if only o | ne had i | ncome) | | | _ | | | | | | |
| one box. | | Married filing separately (MFS) | | | | | ☐ Qualifying | | 0 1 | , | , | | |
| | If y | you checked the MFS box, enter the | name c | of your sp | ouse. If you | u che | ecked the HOF | or Q | SS box, | enter | the chi | ld's na | me if the |
| | qu | alifying person is a child but not you | ır deper | ndent: | | | | | | | | | |
| Digital | | ny time during 2023, did you: (a) rec | | | | | | | | | | | |
| Assets | exch | nange, or otherwise dispose of a dig | | | | | | et)? (Se | ee instru | ction | s.) | Y€ | es 🗵 No |
| Standard | | neone can claim: You as a de | pendent | t 🗌 | Your spous | e as | a dependent | | | | | | |
| Deduction | | Spouse itemizes on a separate retur | n or you | were a | dual-status | alien | | | | | | | |
| Age/Blindnes | s You | : Were born before January 2, 1 | 959 | Are bli | nd Sp | ouse: | : Uas bor | n befo | ore Janua | ary 2, | , 1959 | | s blind |
| Dependent | s (see | instructions): | | (2) S | ocial security | , | (3) Relationship | | (4) Check the b | | x if quali | fies for (| (see instructions) |
| If more | (1) F | irst name Last name | | number to you Child tax c | | | | ax cre | edit | Credit fo | or other dependents | | |
| than four | | | | | | | | | | | | | |
| dependents, see instruction | e — | | | | | | | | | | | | |
| and check | | | | | | | | | | | | | |
| here L | | | | | | | | | | | | | |
| Income | 1a | Total amount from Form(s) W-2, b | , | | , | | | | | | 1a | | 110,401. |
| Attach Form(s) | b | Household employee wages not re | | | . , | | | | | | 1b | | |
| W-2 here. Also | C | Tip income not reported on line 1a | • | | • | | | | | | 1c | | |
| attach Forms W-2G and | d | | dicaid waiver payments not reported on Form(s) W-2 (see instructions) | | | | | | | 1d | | | |
| 1099-R if tax | е | Taxable dependent care benefits f | | | | | | | | | 1e | _ | |
| was withheld. | f | Employer-provided adoption bene | etits tron | n Form 88 | 839, line 29 | | | | | | 1f | | |
| If you did not get a Form | 9 | Wages from Form 8919, line 6 . | | | | | | | | | 1g | | |
| W-2, see | h | Other earned income (see instruct | , | | | | | · · | | | 1h | | 0. |
| instructions. | i | Nontaxable combat pay election (s | see instr | ructions) | | | <u>1</u> i | | | | | | 110 401 |
| | <u>z</u> | Add lines 1a through 1h | · i | | | | | | | | 1z | _ | 110,401. |
| Attach Sch. B if required. | 2a | · – | 2a | | | | axable interest | | | | 2b | _ | |
| roquireu. | 3a_ | | 3a | | | | rdinary divide | | | | 3b | _ | |
| Standard | 4a | - | 4a | | | | axable amoun | | | | 4b | _ | |
| Deduction for— | 5a | | 5a | | | | axable amoun | | | | 5b | _ | |
| Single or Married filing | 6a | , | 6a | | -ll · ! · · | | axable amoun | τ | | | 6b | | |
| separately, \$13,850 | C | If you elect to use the lump-sum e | | | | ` | , | | | | - I | | |
| Married filing | 7 | Capital gain or (loss). Attach Sche | | | | | | | | . L | 7 | | _16 042 |
| jointly or Qualifying | 8 | Add lines 17 2b 2b 4b 5b 6b 7 | | | | | | | | | 8 | | <u>-16,943.</u> |
| surviving spouse, \$27,700 | 9 | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7 | | - | | | | | | | 9 | | 93,458. |
| Head of | 10 | Adjustments to income from Sche | | | | | | | | | 10 | | 02 450 |
| household, \$20,800 | 11 | Subtract line 10 from line 9. This is | - | | | | | | | | 11 | | 93,458. |
| If you checked | 12 | Standard deduction or itemized | | | | | E A | | | | 12 | | 13,850. |
| any box under Standard | 13 | Qualified business income deduct | | | | | | | | | 13 | | 12 050 |
| Deduction, see instructions. | 14 | Add lines 12 and 13 | | | | | | | | | 14 | | 13,850. |

| Form 1040 (202) | 3) | | | | | | | | Page Z | |
|---|------|---|-------------------------|---|--------------------|------------------------|-------------------------|--|-----------------------|--|
| Tax and | 16 | Tax (see instructions). Check it | f any from Form | (s): 1 881 | 4 2 🗌 4972 | з 🗌 | | 16 | 12,825. | |
| Credits | 17 | Amount from Schedule 2, line | e3 | | | | | 17 | | |
| | 18 | Add lines 16 and 17 | 18 | 12,825. | | | | | | |
| | 19 | Child tax credit or credit for c | other dependen | ts from Sched | ule 8812 | | | 19 | | |
| | 20 | Amount from Schedule 3, line | 98 | | | | | 20 | | |
| | 21 | Add lines 19 and 20 | | | | | | 21 | | |
| | 22 | Subtract line 21 from line 18. | If zero or less, | enter -0 | | | | 22 | 12,825. | |
| | 23 | Other taxes, including self-en | nployment tax, | from Schedule | e 2, line 21 | | | 23 | 0. | |
| | 24 | Add lines 22 and 23. This is y | our total tax | | | | | 24 | 12,825. | |
| Payments | 25 | Federal income tax withheld | from: | | | | | | | |
| - | а | Form(s) W-2 | | | | 25a 19 | 770. | | | |
| | b | Form(s) 1099 | | | | 25b | | | | |
| | С | Other forms (see instructions) |) | | | 25c | | | | |
| | d | Add lines 25a through 25c . | | | | | | 25d | 19,770. | |
| If you have a | 26 | 2023 estimated tax payments | s and amount a | pplied from 20 |)22 return | | | 26 | | |
| qualifying child, | 27 | Earned income credit (EIC) . | | | No . | 27 | | | | |
| attach Sch. EIC. | 28 | Additional child tax credit from | Schedule 8812 | | | 28 | | | | |
| | 29 | American opportunity credit f | from Form 8863 | 8, line 8 | | 29 | | | | |
| | 30 | Reserved for future use | | | | 30 | | | | |
| | 31 | Amount from Schedule 3, line | | | | | | | | |
| | 32 | Add lines 27, 28, 29, and 31. | 32 | | | | | | | |
| | 33 | Add lines 25d, 26, and 32. Th | nese are your to | tal payments | | | | 33 | 19,770. | |
| Refund | 34 | If line 33 is more than line 24, | , subtract line 2 | 4 from line 33. | This is the amour | nt you overpaid | | 34 | 6,945. | |
| | 35a | Amount of line 34 you want re | efunded to you | ı. If Form 8888 | is attached, chec | k here | 🗆 | 35a | 6,945. | |
| Direct deposit? | b | Routing number 0 2 1 | 1 0 0 3 | 6 1 | c Type: | Checking | Savings | | | |
| See instructions. | d | Account number 6 7 8 | 1 7 1 6 | 3 3 | | | | | | |
| | 36 | Amount of line 34 you want a | pplied to your | 2024 estimate | ed tax | 36 | | | | |
| Amount | 37 | Subtract line 33 from line 24. | This is the amo | ount you owe | | | | | | |
| You Owe | | For details on how to pay, go | to www.irs.gov | //Payments or | see instructions . | | | 37 | | |
| | 38 | Estimated tax penalty (see in: | structions) . | | | 38 | | | | |
| Third Party | | you want to allow another | • | | | | | | | |
| Designee | | structions | | | | | omplete | | ⊠ No | |
| | | esignee's me | | Phone no. | | | onal ident ber (PIN) | ification | | |
| Sign | | | at I have examined | | accompanying sche | | , , | the best | of my knowledge and | |
| - | be | Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which | | | | | | | er has any knowledge. | |
| Here | Yo | our signature | | Date | Your occupation | If th | e IRS sei | nt you an Identity | | |
| | | | | | | | | | IN, enter it here | |
| Joint return? | | Spouse's signature. If a joint return, both must sign. | | SOFTWARE ENGINEER Date Spouse's occupation | | | | (see inst.) If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) | | |
| See instructions. Keep a copy for your records. | | | | | | | | | | |
| | ——Ph | one no. (475) 449-5228 | 3 | Email address | SHOBHITHA1EN | IGMA@GMAIL.C | OM MO | | | |
| | Pre | | Preparer's signat | ure | | Date | PTIN | | Check if: | |
| Paid | SYAM | PRIYA RAM SAGAR GUPTA TALLAM | SYAM PRIYA | RAM SAGAR | GUPTA TALLAM | 03/13/2024 | P0208 | 2703 | Self-employed | |
| Preparer | | m's name GLOBAL TAX | | | | 1 / / | | | (678) 965-9522 | |
| Use Only | | m's address 245 ROONEY | | NSWICK N | J 08816 | | | ı's EIN | 84-3171965 | |
| | | 10105 | | J J | | | 1 | | - 1040 | |

SCHEDULE 1 (Form 1040)

Additional Income and Adjustments to Income

OMB No. 1545-0074

2023

Attachment
Seguence No. 01

Department of the Treasury Internal Revenue Service

SHOBHITHA SARAB

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

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

Go to www.irs.gov/Form1040 for instructions and the latest information.

| | Sequence No. 01 |
|----------|------------------------|
| Your soc | ial security number |
| 627-93 | -7506 |

| Par | Additional Income | | | |
|--------|---|------------------|----|--------------|
| 1 | Taxable refunds, credits, or offsets of state and local income taxes | | 1 | |
| 2a | Alimony received | | 2a | |
| b | Date of original divorce or separation agreement (see instructions): | | | |
| 3 | Business income or (loss). Attach Schedule C | | 3 | |
| 4 | Other gains or (losses). Attach Form 4797 | | 4 | |
| 5 | Rental real estate, royalties, partnerships, S corporations, trusts, etc. Att | ach Schedule E . | 5 | -16,943. |
| 6 | Farm income or (loss). Attach Schedule F | | 6 | |
| 7 | Unemployment compensation | | 7 | |
| 8 | Other income: | | | |
| а | Net operating loss | 8a (|) | |
| b | Gambling | 8b | | |
| С | Cancellation of debt | 8c | | |
| d | Foreign earned income exclusion from Form 2555 | 8d (|) | |
| е | Income from Form 8853 | 8e | | |
| f | Income from Form 8889 | 8f | | |
| g | Alaska Permanent Fund dividends | 8g | | |
| h | Jury duty pay | 8h | | |
| i | Prizes and awards | 8i | | |
| j | Activity not engaged in for profit income | 8j | | |
| k | Stock options | 8k | | |
| I | 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 | | | |
| | instructions) | 8m | | |
| n | Section 951(a) inclusion (see instructions) | 8n | | |
| 0 | Section 951A(a) inclusion (see instructions) | 80 | | |
| р | Section 461(I) excess business loss adjustment | 8p | | |
| q | Taxable distributions from an ABLE account (see instructions) | 8q | | |
| r | Scholarship and fellowship grants not reported on Form W-2 | 8r | | |
| S | Nontaxable amount of Medicaid waiver payments included on Form | | | |
| _ | 1040, line 1a or 1d | 8s (| 2 | |
| t | Pension or annuity from a nonqualifed deferred compensation plan or | | | |
| | a nongovernmental section 457 plan | 8t | | |
| u - | Wages earned while incarcerated | 8u | | |
| Z | Other income. List type and amount: | | | |
| 0 | | 8z | 9 | |
| 9 | Total other income. Add lines 8a through 8z | | 9 | |
| 10 | 1040, 1040-SR, or 1040-NR, line 8 | | 10 | -16,943. |
| | 10-10, 10-10 OII, OI 10-10 INII, IIII0 0 | | IU | ± U, J = J • |

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

| Par | t II Adjustments to Income | | | |
|------------|---|------------------|-----|--|
| 11 | Educator expenses | | 11 | |
| 12 | Certain business expenses of reservists, performing artists, and fee-ba | asis government | | |
| | officials. Attach Form 2106 | | 12 | |
| 13 | Health savings account deduction. Attach Form 8889 | | 13 | |
| 14 | Moving expenses for members of the Armed Forces. Attach Form 3903 . | | 14 | |
| 15 | Deductible part of self-employment tax. Attach Schedule SE | | 15 | |
| 16 | Self-employed SEP, SIMPLE, and qualified plans | | 16 | |
| 17 | Self-employed health insurance deduction | | 17 | |
| 18 | Penalty on early withdrawal of savings | | 18 | |
| 19a | Alimony paid | | 19a | |
| b | Recipient's SSN | | | |
| С | Date of original divorce or separation agreement (see instructions): | | | |
| 20 | IRA deduction | | 20 | |
| 21 | Student loan interest deduction | | 21 | |
| 22 | Reserved for future use | | 22 | |
| 23 | Archer MSA deduction | | 23 | |
| 24 | Other adjustments: | | | |
| а | Jury duty pay (see instructions) | ła | | |
| b | Deductible expenses related to income reported on line 8l from the | | | |
| | rental of personal property engaged in for profit | łb | | |
| С | Nontaxable amount of the value of Olympic and Paralympic medals | | | |
| | and USOC prize money reported on line 8m | | | |
| d | Reforestation amortization and expenses | ld | | |
| е | Repayment of supplemental unemployment benefits under the Trade | | | |
| | Act of 1974 | | | |
| f | Contributions to section 501(c)(18)(D) pension plans | | | |
| g | Contributions by certain chaplains to section 403(b) plans 24 | lg | | |
| h | Attorney fees and court costs for actions involving certain unlawful | | | |
| | discrimination claims (see instructions) | łh | | |
| i | Attorney fees and court costs you paid in connection with an award | | | |
| | from the IRS for information you provided that helped the IRS detect | | | |
| | tax law violations | | | |
| j | Housing deduction from Form 2555 | 4j | | |
| k | Excess deductions of section 67(e) expenses from Schedule K-1 (Form | | | |
| | 1041) | łk | | |
| Z | Other adjustments. List type and amount: | | | |
| 0 - | | | 05 | |
| 25 26 | Total other adjustments. Add lines 24a through 24z | | 25 | |
| 26 | Add lines 11 through 23 and 25. These are your adjustments to income . E | nter here and on | | |
| | Form 1040, 1040-SR, or 1040-NR, line 10 | <u> </u> | 26 | |

SCHEDULE E (Form 1040)

Supplemental Income and Loss

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

Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

Your social security number

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

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

Attachment Sequence No. 13

OMB No. 1545-0074

| SHOE | BHITHA SARAB | | | | | | 627-9 | 3-7506 | |
|-------|---|----------|-----------|------------------------|----------|----------------|------------|---------------|----------------|
| Par | | d Ro | yalties | | | | | | |
| | Note: If you are in the business of renting personal proper | ty, use | Schedule | C. See | instru | ctions. If you | are an ind | ividual, rep | ort farm |
| | rental income or loss from Form 4835 on page 2, line 40. | | | 0000.0 | . | | | | - V IN- |
| | Did you make any payments in 2023 that would require you | | | | | | | | |
| В | f "Yes," did you or will you file required Form(s) 1099? . | | | | | | | . <u> </u> Ye | es 🗌 No |
| 1a | Physical address of each property (street, city, state, ZIF | code | e) | | | | | | |
| Α | PLOT NO:35VIMALADEVI NAGAR MALKAJGIRI | HYDE | ERABAD, | TELA | NGAN. | A IN 500 | 047 | | |
| В | | | | | | | | | |
| С | | | | | | | | | |
| 1b | Type of Property 2 For each rental real estate prope | rty lis | ted | | Fa | ir Rental | Perso | nal Use | 0.11/ |
| | (from list below) above, report the number of fair | rental | and | | | Days | Da | ays | QJV |
| Α | personal use days. Check the Q | | | Α | | 345 | | 0 | |
| В | if you meet the requirements to f qualified joint venture. See instru | | | В | | | | | |
| С | quained joint venture. See institu | CLIOITS | o. | С | | | | | |
| Туре | of Property: | | | | | | | | |
| 1 | Single Family Residence 3 Vacation/Short-Term Ren | tal | 5 Land | | | Self-Rental | | | |
| 2 | Multi-Family Residence 4 Commercial | | 6 Roya | lties | 8 | Other (desc | ribe) | | |
| | | | | | | Propert | | | |
| Incon | 00' | | | Α | | В | 103. | | С |
| 3 | Rents received | 3 | | | 20. | | | | |
| 4 | Royalties received | 4 | | | 20. | | | | |
| Expe | | | | | | | | | |
| 5 | Advertising | 5 | | | | | | | |
| 6 | Auto and travel (see instructions) | 6 | | | | | | | |
| 7 | Cleaning and maintenance | 7 | | 1.0 | 59. | | | | |
| 8 | Commissions | 8 | | | | | | | |
| 9 | Insurance | 9 | | | | | | | |
| 10 | Legal and other professional fees | 10 | | | | | | | |
| 11 | Management fees | 11 | | 2.1 | 45. | | | | |
| 12 | Mortgage interest paid to banks, etc. (see instructions) | 12 | | | | | | | |
| 13 | Other interest | 13 | | | | | | | |
| 14 | Repairs | 14 | | 3,5 | 28. | | | | |
| 15 | Supplies | 15 | | | 10. | | | | |
| 16 | Taxes | 16 | | | | | | | |
| 17 | Utilities | 17 | | 2,4 | 15. | | | | |
| 18 | Depreciation expense or depletion | 18 | | 3,1 | 06. | | | | |
| 19 | Other (list) | 19 | | | | | | | |
| 20 | Total expenses. Add lines 5 through 19 | 20 | | 17,6 | 63. | | | | |
| 21 | Subtract line 20 from line 3 (rents) and/or 4 (royalties). If | | | | | | | | |
| | result is a (loss), see instructions to find out if you must | | | | | | | | |
| | file Form 6198 | 21 | - | - 16 , 9 | 43. | | | | |
| 22 | Deductible rental real estate loss after limitation, if any, | | | | | | | | |
| | on Form 8582 (see instructions) | 22 | (| 16,94 | 13.) | (| |)(|) |
| 23a | Total of all amounts reported on line 3 for all rental prope | | | | 23a | | 720. | | |
| b | Total of all amounts reported on line 4 for all royalty prop | | | | 23b | | | | |
| С | Total of all amounts reported on line 12 for all properties | | | | 23c | | | | |
| d | Total of all amounts reported on line 18 for all properties | | | | 23d | | 3,106. | | |
| е | Total of all amounts reported on line 20 for all properties | | | | 23e | 17 | 7,663. | | |
| 24 | Income. Add positive amounts shown on line 21. Do not | | - | | | | . 24 | | |
| 25 | Losses. Add royalty losses from line 21 and rental real estate | | | | | | | (| 16,943.) |
| 26 | Total rental real estate and royalty income or (loss). | | | | | | | | |
| | here. If Parts II, III, and IV, and line 40 on page 2 do no | | | | | | on | | _16 0/3 |
| | SCHEDULE LIFORM HIVIN IND 5 LITORWISE INCUIDE THE ST | TICHLINE | IN THE TO | ai an ii | 110 /17 | OU Dade 3 | 1 00 | 1 | _ 16 4/17 |

Department of the Treasury

Internal Revenue Service

Health Savings Accounts (HSAs)

Attach to Form 1040, 1040-SR, or 1040-NR. Go to www.irs.gov/Form8889 for instructions and the latest information. OMB No. 1545-0074 Attachment

Sequence No. **52**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

SHOBHITHA SARAB

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions. 627-93-7506

| Befo | re you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, i | f requ | ired. |
|------|--|---------|---------------------------|
| Part | HSA Contributions and Deduction. See the instructions before completing this part. If y and both you and your spouse each have separate HSAs, complete a separate Part I for | | |
| 1 | Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2023. See instructions. | X Se | elf-only \square Family |
| 2 | HSA contributions you made for 2023 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2023. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions | 2 | 0. |
| 3 | If you were under age 55 at the end of 2023 and, on the first day of every month during 2023, you were, or were considered, an eligible individual with the same coverage, enter \$3,850 (\$7,750 for family coverage). All others , see the instructions for the amount to enter | 3 | 3,850. |
| 4 | Enter the amount you and your employer contributed to your Archer MSAs for 2023 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2023, also include any amount contributed to your spouse's Archer MSAs | 4 | 0. |
| 5 | Subtract line 4 from line 3. If zero or less, enter -0 | 5 | 3,850. |
| 6 | Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family | | 3,000. |
| Ū | coverage under an HDHP at any time during 2023, see the instructions for the amount to enter | 6 | 3 , 850. |
| 7 | If you were age 55 or older at the end of 2023, married, and you or your spouse had family coverage under an HDHP at any time during 2023, enter your additional contribution amount. See instructions. | 7 | 0. |
| 8 | Add lines 6 and 7 | 8 | 3,850. |
| 9 | Employer contributions made to your HSAs for 2023 | _ | 3,030. |
| 10 | Qualified HSA funding distributions | | |
| 11 | Add lines 9 and 10 | 11 | 2,500. |
| 12 | Subtract line 11 from line 8. If zero or less, enter -0 | 12 | 1,350. |
| 13 | HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13 | 13 | 0. |
| | Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions. | | |
| Part | HSA Distributions. If you are filing jointly and both you and your spouse each have separate Part II for each spouse. | arate l | HSAs, complete |
| 14a | Total distributions you received in 2023 from all HSAs (see instructions) | 14a | |
| b | Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions | 14b | |
| С | Subtract line 14b from line 14a | 14c | |
| 15 | Qualified medical expenses paid using HSA distributions (see instructions) | 15 | |
| 16 | Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0 Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f | 16 | |
| 17a | If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here | | |
| b | Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c | 17b | |
| Part | | | |
| 18 | Last-month rule | 18 | |
| 19 | Qualified HSA funding distribution | 19 | |
| 20 | Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f . | 20 | |
| 21 | Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form | | |
| | 1040). Part II. line 17d | 21 | |