| Form <b>8879</b>           |
|----------------------------|
| (Rev. January 2021)        |
| Department of the Treesure |

#### 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)

T.....

| Taxpayer | 's name  | Social securit | ty numb  | per          |
|----------|--|----------------|----------|--------------|
| VENK     | ATA SAI ROHIT AYYAGARI   | 651-91-        | -1862    | 2            |
| Spouse's | s name   | Spouse's soc   | ial secu | urity number |
| Part     | Tax Return Information – Tax Year Ending December 31, 2023 (Enter      | vear vou a     | re aut   | thorizina.)  |
|          | whole dollars only on lines 1 through 5.                               | <b>j j</b>     |          | 57           |
| Note: F  | Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank. |                |          |              |
| 1        | Adjusted gross income  |                | 1        | 114,865.     |
| 2        | Total tax  |                | 2        | 17,644.      |
| 3        | Federal income tax withheld from Form(s) W-2 and Form(s) 1099          |                | 3        | 26,033.      |
| 4        | Amount you want refunded to you  |                | 4        | 8,389.       |
| 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 |
|---|-------------|--------------|-----|-----------------------------|
|   |             |              |     |                             |

|   | er fiv<br>i't er |   |   |   | as |
|---|------------------|---|---|---|----|
| 1 | 1                | 8 | 6 | 2 |    |

my

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.

Your signature

Date

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

I authorize

to enter or generate my PIN

as mv Enter five digits, but don't enter all zeros

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 signature E |   |     |    |   |      |                  | <br>  |     |   |
|----------------------|---|-----|----|---|------|------------------|-------|-----|---|
|                      | Practitioner PIN Method Returns Only—continue                                   | bel | ow |   |      |                  |       |     |   |
| Part III             | Certification and Authentication – Practitioner PIN Method Only                 |     |    |   |      |                  |       |     |   |
| ERO's EFII           | N/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. | 2   | 2  | 2 | <br> | <br>0<br>all zei | <br>2 | 7 1 | 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 🕨           |                          |
|---|-----|------------------|--------------------------|
| ERO Must Retain This F<br>Don't Submit This Form to the               |     |                  |                          |
| For Paperwork Reduction Act Notice, see your tax return instructions. | BAA | REV 02/11/24 PRO | Form 8879 (Rev. 01-2021) |

| <b>1040</b>  |           | artment of the Treasury—Internal Revenue Servi <b>S. Individual Income Ta</b> |          | turn        | 202                  | 3              | OMB No. 1545     | -0074  | IRS Use Onl   | y—Do not v   | vrite or sta | aple in this space.           |
|--|-----------|---|----------|-------------|----------------------|----------------|------------------|--------|---------------|--------------|--------------|-------------------------------|
| For the year Jan                                       | . 1–Dec   | c. 31, 2023, or other tax year beginning                                      |          |             | , 2023, enc          | ding           |                  |        | , 20          | See se       | parate       | instructions.                 |
| Your first name  | and m     | iddle initial   | Last r   | ame         |                      |                |                  |        |               | Your so      | cial sec     | curity number                 |
| VENKATA  | SAI       | ROHIT   | AYY      | AGARI       |                      |                |                  |        |               | 651          | 91           | 1862                          |
|  |           | s first name and middle initial   | Last r   |             |                      |                |                  |        |               |              |              | security numbe                |
|  |           |   |          |             |                      |                |                  |        |               |              |              |                               |
| Home address   | (numbe    | er and street). If you have a P.O. box, see                                   | instruc  | tions.      |                      |                |                  | A      | pt. no.       |              |              | ection Campaigr               |
| 1400 LAU   |           |   |          |             |                      |                |                  |        |               |              |              | ou, or your jointly, want \$3 |
|  |           | ice. If you have a foreign address, also co                                   | mplete   | spaces be   | low.                 | Sta            |                  | ZIP co |               |              |              | nd. Checking a                |
| MINNEAPO   |           |   |          | <b>F</b>    |                      | MN             |                  | 554    |               |              |              | not change                    |
| Foreign country  | / name    |   |          | Foreign p   | rovince/state/       | coun           | ty               | Foreig | n postal code | your ta      | c or refu    | _                             |
| Eiling Status  |           | Single  |          |             |                      |                | Head of ho       | ausah  |               |              |              |                               |
| Filing Status  | , ~       | Married filing jointly (even if only o  | ne had   | income)     |                      |                |                  | Jusen  |               |              |              |                               |
| Check only one box.                                    |           | ] Married filing separately (MFS)   | no nao   | incomo)     |                      |                |                  | surviv | ing spouse    | (QSS)        |              |                               |
| one box.   | lf \      | you checked the MFS box, enter the  | name     | of your s   | pouse. If you        | u che          | , ,              |        | • •           | . ,          | ild's na     | me if the                     |
|  |           | alifying person is a child but not you  |          |             |                      |                |                  |        |               |              |              |                               |
| Distal   |           | ny time during 2023, did you: (a) rece  |          |             |                      |                |                  |        |               |              |              |                               |
| Digital<br>Assets                                      |           | nange, or otherwise dispose of a digi   |          |             |                      |                |                  |        |               |              |              | es 🛛 No                       |
| Standard   |           | neone can claim:  You as a de   |          |             |                      |                | a dependent      | / (-   |               | - /          |              |                               |
| Deduction  | _         | Spouse itemizes on a separate retur   | •        |             |                      |                |                  |        |               |              |              |                               |
| Age/Blindness  | s You     | : Were born before January 2, 1   | 959      | Are bl      | lind <b>Sp</b>       | ouse           | • 🗌 Was bor      | n befr | ore January   | 2 1959       |              | s blind                       |
| Dependents   |           |   |          | <u> </u>    | Social security      |                | (3) Relationsh   | 14     | ,             |              |              | (see instructions):           |
| -  |           | First name Last name  |          | (2)         | number               | /              | to you           |        | Child tax of  | •            |              | or other dependents           |
| lf more<br>than four                                   | <u>.,</u> |   |          |             |                      |                |                  |        |               |              |              |                               |
| 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            | 134,163.                      |
| Attach Form(s)   | b         | Household employee wages not re   | eporte   | d on Form   | n(s) W-2 .           |                |                  |        |               | . 1b         | )            |                               |
| W-2 here. Also   | С         | Tip income not reported on line 1a  | ı (see i | nstruction  | ıs)                  |                |                  |        |               | . 10         | ;            |                               |
| attach Forms<br>W-2G and                               | d         | Medicaid waiver payments not rep  |          |             | , ,                  | nstru          | uctions)         |        |               | . 10         |              |                               |
| 1099-R if tax  | е         | Taxable dependent care benefits f   |          | -           |                      |                |                  | • •    |               | . <u>1</u> e |              |                               |
| was withheld.  | f         | Employer-provided adoption bene   |          |             |                      |                |                  | • •    |               | . <u>1</u> f |              |                               |
| lf you did not<br>get a Form                           | g         | Wages from Form 8919, line 6 .  |          |             |                      | • •            |                  | • •    | · · ·         | · 1g         | -            | 0.                            |
| W-2, see   | h<br>:    | Other earned income (see instruction  | ,        | · · ·       |                      | • •            | · · · · ·        |        |               | . <u>1</u> h |              | 0.                            |
| instructions.  | i         | Nontaxable combat pay election (s<br>Add lines 1a through 1h                  | see ins  | tructions)  |                      | • •            | · · 🔲            |        |               | . 1z         |              | 134,163.                      |
| Attach Sch. B  | z<br>2a   | ° I   | 2a       | • • •       | · · · ·              | <br><b>ь</b> т | axable interest  | · ·    |               | · 12         |              | 191,105.                      |
| if required.   | 2a<br>3a  |   | 2a<br>3a |             |                      |                | Ordinary divider |        |               | . 25         |              |                               |
|  | 4a        |   | 4a       |             |                      |                | axable amount    |        |               | . 4b         |              |                               |
| Standard   | 5a        |   | 5a       |             |                      |                | axable amount    |        |               | . 56         |              |                               |
| <ul> <li>Deduction for —</li> <li>Single or</li> </ul> | 6a        |   | 6a       |             |                      |                | axable amount    |        |               | . 6b         |              |                               |
| Married filing separately,                             | с         | If you elect to use the lump-sum e  |          | method,     | check here           |                |                  |        |               |              |              |                               |
| \$13,850   | 7         | Capital gain or (loss). Attach Sche   | dule D   | if require  | d. If not requ       | uired          | , check here     |        |               | 7            |              | -65.                          |
| <ul> <li>Married filing<br/>jointly or</li> </ul>      | 8         | Additional income from Schedule   |          |             |                      |                |                  |        |               | . 8          |              | -19,233.                      |
| Qualifying surviving spouse,                           | 9         | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,  | , and 8  | . This is y | our <b>total ind</b> | come           | <b>e</b>         |        |               | . 9          |              | 114,865.                      |
| \$27,700   | 10        | Adjustments to income from Sche   | dule 1   | line 26     |                      |                |                  |        |               | . 10         |              |                               |
| <ul> <li>Head of<br/>household,</li> </ul>             | 11        | Subtract line 10 from line 9. This is   | syour    | adjusted    | gross incor          | ne             |                  |        |               | . 11         |              | 114,865.                      |
| \$20,800<br>• If you checked r                         | 12        | Standard deduction or itemized  | deduc    | tions (fro  | m Schedule           | e A)           |                  |        |               | . 12         | :            | 13,850.                       |
| any box under<br>Standard                              | 13        | Qualified business income deduction   | ion fro  | m Form 8    | 995 or Form          | ı 899          | 95-A             |        |               | . 13         | ;            |                               |
| Deduction,   | 14        |   |          |             |                      |                |                  |        |               | . 14         |              | 13,850.                       |
| see instructions.                                      | 15        | Subtract line 14 from line 11. If zer   | o or le  | ss, enter   | -0 This is y         | our 1          | taxable incom    | e.     |               | . 15         |              | 101,015.                      |

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              | n(s): <b>1</b> 🗌 881 | 4 <b>2</b> 4972    | 3 🗌                    | [1                       | 6 17,644.                     |
| Credits                          | 17      | Amount from Schedule 2, line 3                              |                      |                    |                        | 1                        | 7                             |
|                                  | 18      | Add lines 16 and 17   |                      |                    |                        | 1                        | 8 17,644.                     |
|                                  | 19      | Child tax credit or credit for other depender               | nts from Sched       | ule 8812           |                        | 1                        | 9                             |
|                                  | 20      | Amount from Schedule 3, line 8                              |                      |                    |                        | 2                        | 20                            |
|                                  | 21      | Add lines 19 and 20   |                      |                    |                        | 2                        | 1                             |
|                                  | 22      | Subtract line 21 from line 18. If zero or less,             | enter -0             |                    |                        | 2                        | 17,644.                       |
|                                  | 23      | Other taxes, including self-employment tax,                 | , from Schedule      | e 2, line 21 .     |                        | 2                        | 3 0.                          |
|                                  | 24      | Add lines 22 and 23. This is your total tax                 |                      |                    |                        | 2                        | 17,644.                       |
| Payments                         | 25      | Federal income tax withheld from:                           |                      |                    |                        |                          |                               |
| -                                | а       | Form(s) W-2   |                      |                    | <b>25a</b> 26          | ,033.                    |                               |
|                                  | b       | Form(s) 1099  |                      |                    | 25b                    |                          |                               |
|                                  | с       | Other forms (see instructions)                              |                      |                    | 25c                    |                          |                               |
|                                  | d       | Add lines 25a through 25c                                   |                      |                    |                        | 2                        | 5d 26,033.                    |
| If you have a                    | 26      | 2023 estimated tax payments and amount a                    | applied from 20      | )22 return         |                        | 2                        | 26                            |
| qualifying child,                | 27      | Earned income credit (EIC)                                  |                      |                    | 27                     |                          |                               |
| attach Sch. EIC.                 | 28      | Additional child tax credit from Schedule 881               | 2                    |                    | 28                     |                          |                               |
|                                  | 29      | American opportunity credit from Form 886                   | 3, line 8            |                    | 29                     |                          |                               |
|                                  | 30      | Reserved for future use                                     |                      |                    | 30                     |                          |                               |
|                                  | 31      | Amount from Schedule 3, line 15                             |                      |                    | 31                     |                          |                               |
|                                  | 32      | Add lines 27, 28, 29, and 31. These are you                 | r total other p      | ayments and ref    | undable credits        | 3                        | 2                             |
|                                  | 33      | Add lines 25d, 26, and 32. These are your to                | otal payments        |                    |                        | 3                        | <b>3</b> 26,033.              |
| Refund                           | 34      | If line 33 is more than line 24, subtract line 2            | 24 from line 33.     | This is the amou   | nt you <b>overpaid</b> | 3                        | 8,389.                        |
|                                  | 35a     | Amount of line 34 you want refunded to yo                   | u. If Form 8888      | 3 is attached, che | ck here                | . 🗌 🖪                    | 5a 8,389.                     |
| Direct deposit?                  | b       | Routing number 0 3 1 1 0 1 3                                | 3 4                  | c Type: 🛛 🗙        | ] Checking 🛛 🕄         | Savings                  |                               |
| See instructions.                | d       | Account number 3 1 0 0 2 6 2                                | 0 1 7                | 9 4                |                        |                          |                               |
|                                  | 36      | Amount of line 34 you want applied to your                  | 2024 estimate        | ed tax             | 36                     |                          |                               |
| Amount                           | 37      | Subtract line 33 from line 24. This is the am               | ount you owe         |                    |                        |                          |                               |
| You Owe                          |         | For details on how to pay, go to www.irs.go                 | v/Payments or        | see instructions   |                        | 3                        | 7                             |
|                                  | 38      | Estimated tax penalty (see instructions) .                  |                      |                    | 38                     |                          |                               |
| Third Party                      | Do      | you want to allow another person to dis                     | cuss this retu       | rn with the IRS?   | See                    |                          |                               |
| Designee                         | ins     | tructions   |                      |                    | 🗌 <b>Yes.</b> Co       | mplete belo              | w. 🗙 No                       |
|                                  |         | signee's  | Phone                |                    |                        | nal identificat          | ion                           |
| <u>.</u>                         | na      | der penalties of perjury, I declare that I have examine     | no.                  |                    |                        | er (PIN)                 | ant of my knowledge and       |
| Sign                             |         | ief, they are true, correct, and complete. Declaration      |                      | 1 2 0              |                        | ,                        | , ,                           |
| Here                             | Yo      | ur signature  | Date                 | Your occupation    |                        | If the IBS               | sent you an Identity          |
|                                  | 10      |   | Duic                 |                    |                        |                          | on PIN, enter it here         |
| Joint return?                    |         |   |                      | SOFTWARE 1         | ENGINEER               | (see inst.               | )                             |
| See instructions.                | Sp      | ouse's signature. If a joint return, <b>both</b> must sign. | Date                 | Spouse's occupat   | ion                    |                          | sent your spouse an           |
| Keep a copy for<br>your records. |         |   |                      |                    |                        | Identity F<br>(see inst. | Protection PIN, enter it here |
| ,                                |         |   |                      |                    |                        | (300 1131.               | )                             |
|                                  |         | one no. (716)275-6178                                       | Email address        | AVSR2K@GM          |                        |                          | Check if:                     |
| Paid                             |         | Parer's name Preparer's signa                               |                      | 011DE3             | Date                   | PTIN                     |                               |
| Preparer                         |         | PRIYA RAM SAGAR GUPTA TALLAM SYAM PRIYA                     | RAM SAGAR            | GUPTA TALLAM       | 02/20/2024             | P0208270                 |                               |
| Use Only                         |         | n's name GLOBAL TAXES LLC                                   |                      | T 00016            |                        | Phone no                 |                               |
|                                  |         | n's address 245 ROONEY CT E BRU                             | JNSWICK N            |                    |                        | Firm's El                |                               |
| Go to www.irs.go                 | ov/Forn | 1040 for instructions and the latest information.           |                      | BAA                | REV 02/11/24 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 20 23

| Department of the Treasury<br>Internal Revenue Service | Go to www.irs.gov/Form1040 for instructions and the latest information. |          | Attachment<br>Sequence No. <b>01</b> |
|--|---|----------|--------------------------------------|
| Name(s) shown on Fo                                    | rm 1040, 1040-SR, or 1040-NR  | Your soc | ial security number                  |
| VENKATA SAI RO   | HIT AYYAGARI  | 651-91   | -1862                                |

| Par    | t I 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. Attach Schedule  |      | 5           | -19,233.             |
| 6      | Farm income or (loss). Attach Schedule F.  | [    | 6           |                      |
| 7      | Unemployment compensation  | [    | 7           |                      |
| 8      | Other income:  |      |             |                      |
| а      | Net operating loss   | )    |             |                      |
| b      | Gambling   |      |             |                      |
| С      | Cancellation of debt   |      |             |                      |
| d      | Foreign earned income exclusion from Form 2555 8d (  | )    |             |                      |
| е      | Income from Form 8853  |      |             |                      |
| f      | Income from Form 8889  |      |             |                      |
| g      | Alaska Permanent Fund dividends  |      |             |                      |
| h      | Jury duty pay  |      |             |                      |
| i      | Prizes and awards  |      |             |                      |
| j      | Activity not engaged in for profit income  |      |             |                      |
| k      | Stock options  |      |             |                      |
| 1      | 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)  |      |             |                      |
| n      | Section 951(a) inclusion (see instructions)  |      |             |                      |
| 0      | Section 951A(a) inclusion (see instructions)   |      |             |                      |
| р      | Section 461(I) excess business loss adjustment   |      |             |                      |
| 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  | )    |             |                      |
| t      | Pension or annuity from a nonqualifed deferred compensation plan or                        |      |             |                      |
|        | a nongovernmental section 457 plan   |      |             |                      |
| u      | Wages earned while incarcerated  |      |             |                      |
| Z      | Other income. List type and amount:  |      |             |                      |
| ~      |  |      |             |                      |
| 9      | Total other income. Add lines 8a through 8z  |      | 9           |                      |
| 10     | Combine lines 1 through 7 and 9. This is your <b>additional income</b> . Enter here and on | Form |             | 10 000               |
|        | 1040, 1040-SR, or 1040-NR, line 8  |      | <u>10  </u> | -19,233.             |
| For Pa | perwork Reduction Act Notice, see your tax return instructions.                            | Sc   | nedul       | e 1 (Form 1040) 2023 |

| Par | t II Adjustments to Income   |      |               | i              |
|-----|--|------|---------------|----------------|
| 11  | Educator expenses  |      | 11            |                |
| 12  | Certain business expenses of reservists, performing artists, and fee-basis governr   | nent |               |                |
|     | officials. Attach Form 2106  |      | 12            |                |
| 13  | Health savings account deduction. Attach Form 8889                                   |      | 13            |                |
| 14  | Moving expenses for members of the Armed Forces. Attach Form 3903                    |      | 14            |                |
| 15  | Deductible part of self-employment tax. Attach Schedule SE                           |      | 15            |                |
| 16  | Self-employed SEP, SIMPLE, and qualified plans                                       |      | 16            |                |
| 17  | Self-employed health insurance deduction   |      | 17            |                |
| 18  | Penalty on early withdrawal of savings   |      | 18            |                |
| 19a | Alimony paid   |      | 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)   |      |               |                |
| b   | Deductible expenses related to income reported on line 8I from the                   |      |               |                |
|     | rental of personal property engaged in for profit                                    |      |               |                |
| С   | Nontaxable amount of the value of Olympic and Paralympic medals                      |      |               |                |
|     | and USOC prize money reported on line 8m   |      |               |                |
| d   | Reforestation amortization and expenses  |      |               |                |
| е   | Repayment of supplemental unemployment benefits under the Trade                      |      |               |                |
|     | Act of 1974  |      |               |                |
| f   | Contributions to section 501(c)(18)(D) pension plans                                 |      |               |                |
| g   | Contributions by certain chaplains to section 403(b) plans 24g                       |      |               |                |
| h   | Attorney fees and court costs for actions involving certain unlawful                 |      |               |                |
|     | discrimination claims (see instructions)   |      |               |                |
| i   | Attorney fees and court costs you paid in connection with an award                   |      |               |                |
|     | from the IRS for information you provided that helped the IRS detect                 |      |               |                |
|     | tax law violations   |      |               |                |
| j   | Housing deduction from Form 2555   |      |               |                |
| k   | Excess deductions of section 67(e) expenses from Schedule K-1 (Form                  |      |               |                |
|     | 1041)  |      |               |                |
| z   | Other adjustments. List type and amount:   |      |               |                |
|     | 24z  |      |               |                |
| 25  | Total other adjustments. Add lines 24a through 24z                                   |      | 25            |                |
| 26  | Add lines 11 through 23 and 25. These are your adjustments to income. Enter here and |      |               |                |
|     | Form 1040, 1040-SR, or 1040-NR, line 10  |      | 26            |                |
|     | <b>BAA</b> REV 02/11/24 PRO  |      | Schedule 1 (F | orm 1040) 2023 |

### SCHEDULE D (Form 1040)

### **Capital Gains and Losses**

OMB No. 1545-0074

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

Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10. Go to *www.irs.gov/ScheduleD* for instructions and the latest information.

Attachment Sequence No. 12 Your social security number

20

Name(s) shown on return

Department of the Treasury

Internal Revenue Service

VENKATA SAI ROHIT AYYAGARI

651-91-1862

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? 
Yes X No
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

### Part I Short-Term Capital Gains and Losses – Generally Assets Held One Year or Less (see instructions)

| lines<br>This | instructions for how to figure the amounts to enter on the below.<br>form may be easier to complete if you round off cents to e dollars.  | <b>(d)</b><br>Proceeds<br>(sales price) | <b>(e)</b><br>Cost<br>(or other basis) | (g)<br>Adjustment<br>to gain or loss<br>Form(s) 8949, F<br>line 2, column | from<br>Part I, | (h) Gain or (loss)<br>Subtract column (e)<br>from column (d) and<br>combine the result<br>with column (g) |
|---------------|---|---|--|---|-----------------|---|
| 1a            | Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b. |   |  |   |                 |   |
| 1b            | Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked  |   |  |   |                 |   |
| 2             | Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked  | 365.                                    | 442.                                   |   | 12.             | -65.  |
| 3             | Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked  |   |  |   |                 |   |
| 4             | Short-term gain from Form 6252 and short-term gain or (   | oss) from Forms 4                       | 684, 6781, and 88                      | 324   | 4               |   |
| 5             | Net short-term gain or (loss) from partnerships, Schedule(s) K-1  |   |  |   | 5               |   |
| 6             | Short-term capital loss carryover. Enter the amount, if an <b>Worksheet</b> in the instructions   |   | •                                      | -   | 6               | ( )   |
| 7             | Net short-term capital gain or (loss). Combine lines 1a term capital gains or losses, go to Part II below. Otherwise  |   | 7                                      | -65.  |                 |   |

### Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions)

| lines | instructions for how to figure the amounts to enter on the below.<br>form may be easier to complete if you round off cents to  | <b>(d)</b><br>Proceeds<br>(sales price) | <b>(e)</b><br>Cost<br>(or other basis) | (g)<br>Adjustments<br>to gain or loss from<br>Form(s) 8949, Part II |  | (h) Gain or (loss)<br>Subtract column (e)<br>from column (d) and<br>combine the result |  |
|-------|--|---|--|---|--|--|--|
|       | e dollars.   | (sales price)                           |  | line 2, colum   |  | with column (g)  |  |
| 8a    | Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b. |   |  |   |  |  |  |
| 8b    | Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked   |   |  |   |  |  |  |
| 9     | Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked   |   |  |   |  |  |  |
| 10    | Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked.  |   |  |   |  |  |  |
| 11    | Gain from Form 4797, Part I; long-term gain from Forms from Forms 4684, 6781, and 8824   |   | 11                                     |   |  |  |  |
| 12    | Net long-term gain or (loss) from partnerships, S corporat   | dule(s) K-1                             | 12                                     |   |  |  |  |
| 13    | Capital gain distributions. See the instructions   |   | 13                                     |   |  |  |  |
| 14    | Long-term capital loss carryover. Enter the amount, if any <b>Worksheet</b> in the instructions  | -                                       | 14                                     | ( )   |  |  |  |
| 15    | Net long-term capital gain or (loss). Combine lines 8a on the back .   |   | 15                                     |   |  |  |  |

| Part | III Summary  |                  |
|------|--|------------------|
| 16   | Combine lines 7 and 15 and enter the result  | <b>16</b> -65.   |
|      | • If line 16 is a <b>gain</b> , enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.  |                  |
|      | • If line 16 is a <b>loss</b> , skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.   |                  |
|      | • If line 16 is <b>zero</b> , skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.   |                  |
| 17   | Are lines 15 and 16 <b>both</b> gains?   |                  |
|      | $\square$ No. Skip lines 18 through 21, and go to line 22.   |                  |
| 18   | If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet   | 18               |
| 19   | If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet   | 19               |
| 20   | <ul> <li>Are lines 18 and 19 both zero or blank and you are not filing Form 4952?</li> <li>Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below.</li> </ul> |                  |
|      | ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.   |                  |
| 21   | If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:  |                  |
|      | The loss on line 16; or     (\$3,000), or if married filing separately, (\$1,500)  | <b>21</b> ( 65.) |
|      | Note: When figuring which amount is smaller, treat both amounts as positive numbers.   |                  |
| 22   | Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?  |                  |
|      | ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16.   |                  |
|      | X No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.   |                  |

BAA REV 02/11/24 PRO

Schedule D (Form 1040) 2023

8949

Department of the Treasury

Internal Revenue Service

# Sales and Other Dispositions of Capital Assets

File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.



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

| Name(s) shown on return    | Social security number or taxpayer identification number |  |  |  |  |
|----------------------------|--|--|--|--|--|
| VENKATA SAI ROHIT AYYAGARI | 651-91-1862  |  |  |  |  |
|                            |  |  |  |  |  |

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

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

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

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

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

X (B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

C) Short-term transactions not reported to you on Form 1099-B

| <b>1</b><br>(a)<br>Description of property  | <b>(b)</b><br>Date acquired                | <b>(c)</b><br>Date sold or  | <b>(d)</b><br>Proceeds | <b>(e)</b><br>Cost or other basis<br>See the <b>Note</b> below | Adjustment, if any, to gain or loss<br>If you enter an amount in column (g),<br>enter a code in column (f).<br>See the separate instructions. |     | Gain or (loss)<br>Subtract column (e)                         |  |
|---|--|---|------------------------|--|---|-----|---|--|
| (Example: 100 sh. XYZ Co.)  | (Mo., day, yr.)                            | disposed of (sales price) a<br>(Mo., day, yr.) (see instructions) |                        | and see <i>Column</i> (e)<br>in the separate<br>instructions.  | (f) (g)<br>Code(s) from<br>instructions Amount of<br>adjustment   |     | from column (d) and<br>combine the result<br>with column (g). |  |
| FIDELITY BROKERAGE SERVICES LLC   | 05/17/23                                   | 12/31/23  | 365.                   | 442.   | W   | 12. | -65.  |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
|   |  |   |                        |  |   |     |   |  |
| 2 Totals. Add the amounts in columns<br>negative amounts). Enter each tota<br>Schedule D, line 1b (if Box A above<br>above is checked), or line 3 (if Box C | al here and inc<br>is checked), <b>lir</b> | lude on your<br>1e 2 (if Box B                                    | 365.                   | 442.   |   | 12. | -65.  |  |

Note: If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

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

|   | DULE E  | Supplemental Income and Loss |                |  |         |               |          |         |                  | OMB No      | o. 1545-0074 |         |
|---|---|------------------------------|----------------|--|---------|---------------|----------|---------|------------------|-------------|--------------|---------|
| (Form 1040) (From rental real estate, royalties, partnerships, S corporations, estates,           |   |                              |                |  |         | trusts, REMIC | s, etc.) | 20      | <b>93</b>        |             |              |         |
| Departm   | Department of the Treasury Attach to Form 1040, 1040-SR, 1040-NR, or 1041.  |                              |                |  |         |               |          | Attachm |                  |             |              |         |
| Internal Revenue Service Go to www.irs.gov/ScheduleE for instructions and the latest information. |   |                              |                |  |         |               |          | Sequen  | ce No. <b>13</b> |             |              |         |
| Name(s) shown on return Your social   |   |                              |                |  |         |               |          |         |                  | al security | number       |         |
| VENKATA SAI ROHIT AYYAGARI 651-91-  |   |                              |                |  |         |               |          |         | 1-1862           |             |              |         |
| Part  | Part I Income or Loss From Rental Real Estate and Royalties   |                              |                |  |         |               |          |         |                  |             |              |         |
|   | Note: If you are in the business of renting personal property, use Schedule C. See instructions. If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40. |                              |                |  |         |               |          |         |                  |             |              |         |
| A D   |   |                              |                | hat would require you                          | to file | Form(s) 1     | 10992 5  | See ins | tructions        |             |              | s X No  |
|   | •   |                              |                |  |         | . ,           |          |         |                  |             |              |         |
|   |   | ,                            |                | ( )  |         |               |          |         |                  |             |              |         |
| 1a  | -   |                              |                | (street, city, state, ZIF                      |         | ,             |          |         |                  |             |              |         |
| <b>A</b>  | D14NDDB C   | AMPUS,                       | 80FEET R       | OAD 8TH BLOCK K                                | CORAN   | IANAGAI       | BAN      | GALOI   | RE, KARNAT       | AKA II      | N 56009      | 95      |
| B   |   |                              |                |  |         |               |          |         |                  |             |              |         |
| C   |   |                              |                |  |         |               |          | 1       |                  |             |              |         |
| 1b  | Type of Prope   |                              |                | ental real estate prope                        |         |               |          | Fa      | ir Rental        | Person      |              | QJV     |
|   | (from list below  | N)                           |                | ort the number of fair<br>se days. Check the Q |         |               |          |         | Days             | Da          | -            |         |
| <u>A</u>  | 3   |                              |                | t the requirements to f                        |         |               | Α        |         | 365              |             | 0            |         |
| B   |   |                              |                | int venture. See instru                        |         |               | В        |         |                  |             |              |         |
|   |   |                              |                |  |         |               | С        |         |                  |             |              |         |
|   | of Property:  |                              | 0. V (         |  |         |               |          | -       |                  |             |              |         |
|   | Single Family R   |                              |                | ation/Short-Term Ren                           | tal     | 5 Land        |          |         | Self-Rental      |             |              |         |
| 2   | Multi-Family Re   | sidence                      | 4 Con          | nmercial                                       |         | 6 Roya        | alties   | 8       | Other (descr     | ibe)        |              |         |
|   |   |                              |                |  |         |               |          |         | Propertie        | es:         |              |         |
| Incom   | ie:   |                              |                |  |         |               | Α        |         | В                |             |              | С       |
| 3   | Rents received  | ł                            |                |  | 3       |               | б        | 40.     |                  |             |              |         |
| 4   | Royalties rece  | ived                         |                |  | 4       |               |          |         |                  |             |              |         |
| Expen   | ises:   |                              |                |  |         |               |          |         |                  |             |              |         |
| 5   | Advertising   |                              |                |  | 5       |               |          |         |                  |             |              |         |
| 6   | Auto and trave  | l (see ins                   | structions)    |  | 6       |               |          |         |                  |             |              |         |
| 7   | Cleaning and r  | naintena                     | ance           |  | 7       |               | 1,8      | 40.     |                  |             |              |         |
| 8   | Commissions   |                              |                |  | 8       |               |          |         |                  |             |              |         |
| 9   | Insurance .   |                              |                |  | 9       |               |          |         |                  |             |              |         |
| 10  | Legal and othe  | er profes                    | sional fees    |  | 10      |               |          |         |                  |             |              |         |
| 11  | Management f  | ees                          |                |  | 11      |               | 1,5      | 60.     |                  |             |              |         |
| 12  | Mortgage inter  | est paid                     | l to banks, et | c. (see instructions)                          | 12      |               |          |         |                  |             |              |         |
| 13  | Other interest  |                              |                |  | 13      |               |          |         |                  |             |              |         |
| 14  | Repairs   |                              |                |  | 14      |               | 5,2      | 17.     |                  |             |              |         |
| 15  | Supplies .  |                              |                |  | 15      |               | 5,4      | 90.     |                  |             |              |         |
| 16  |   |                              |                |  | 16      |               |          |         |                  |             |              |         |
| 17  | Utilities   |                              |                |  | 17      |               | 5,7      | 66.     |                  |             |              |         |
| 18  | Depreciation e  | xpense                       | or depletion   |  | 18      |               |          |         |                  |             |              |         |
| 19  | Other (list)  |                              |                |  | 19      |               |          |         |                  |             |              |         |
| 20  | Total expenses  | s. Add lir                   | nes 5 throug   | h19  | 20      |               | 19,8     | 73.     |                  |             |              |         |
| 21  |   |                              |                | and/or 4 (royalties). If                       |         |               |          |         |                  |             |              |         |
|   |   |                              |                | find out if you must                           | _       |               | 10 -     | ~       |                  |             |              |         |
|   | file Form 6198  |                              |                |  | 21      |               | -19,2    | 33.     |                  |             |              |         |
| 22  |   |                              |                | fter limitation, if any,                       |         |               |          |         | ,                | _           | ,            |         |
| ~-  | on Form 8582 (see instructions)   |                              |                |  |         |               | )        | (       |                  |             |              |         |
| 23a   |   |                              |                | •  | 23a     |               | 640.     |         |                  |             |              |         |
| b   |   |                              |                | e 4 for all royalty prop                       | erties  |               | •        | 23b     |                  |             |              |         |
| c   |   |                              |                | e 12 for all properties                        | • •     |               | ·        | 23c     |                  |             |              |         |
| d   |   |                              |                | e 18 for all properties                        | • •     |               | •        | 23d     |                  | 0.00        |              |         |
| e   |   |                              |                | e 20 for all properties                        |         |               | •        | 23e     | 19               | ,873.       |              |         |
| 24  |   |                              |                | wn on line 21. <b>Do not</b>                   |         | -             |          |         | · · · ·          | . 24        | /            | 10 000  |
| 25  |   |                              |                | 21 and rental real estate                      |         |               |          |         |                  |             | (            | 19,233. |
| 26  | Total rental re   | eal estat                    | te and royal   | ty income or (loss).                           | Comb    | ine lines i   | 24 and   | 25. E   | nter the resu    | it          |              |         |

here. If Parts II, III, and IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2 -19,233. NPA For Paperwork Reduction Act Notice, see the separate instructions.

26

.

-19,233.

Form **88889** 

# Health Savings Accounts (HSAs)

OMB No. 1545-0074

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

| 2023                                 |
|--------------------------------------|
| Attachment<br>Sequence No. <b>52</b> |

|  | Revenue Service Go to www.irs.gov/Form8889 for instructions and the latest information.   |              | Attachment<br>Sequence No. <b>52</b> |  |  |  |
|--|---|--------------|--------------------------------------|--|--|--|
| Name(s                                 |   | ity number   | of HSA beneficiary.                  |  |  |  |
| VENKATA SAI ROHIT AYYAGARI 651-91-1862 |   |              |                                      |  |  |  |
| Befor                                  | re you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contract   | s, if req    | uired.                               |  |  |  |
| Part                                   |   |              |                                      |  |  |  |
|  | and both you and your spouse each have separate HSAs, complete a separate Part I  |              |                                      |  |  |  |
| 1                                      | Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 202   |              |                                      |  |  |  |
|  | See instructions  | . 🗵 S        | elf-only C 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. <b>Do not</b> include employer contribution contributions through a cafeteria plan, or rollovers. See instructions   |              | 0                                    |  |  |  |
| 2                                      | If you were under age 55 at the end of 2023 and, on the first day of <b>every</b> month during 2023, you  |              | 0.                                   |  |  |  |
| 3                                      | were, or were considered, an eligible individual with the same coverage, enter \$3,850 (\$7,750 f   |              |                                      |  |  |  |
|  | family coverage). All others, see the instructions for the amount to enter  |              | 3,850.                               |  |  |  |
| 4                                      | Enter the amount you and your employer contributed to your Archer MSAs for 2023 from Form 885   |              |                                      |  |  |  |
| •                                      | 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   |              | 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 fam  | ly           |                                      |  |  |  |
|  | coverage under an HDHP at any time during 2023, see the instructions for the amount to enter .  | -            | 3,850.                               |  |  |  |
| 7                                      | If you were age 55 or older at the end of 2023, married, and you or your spouse had family coverage   |              |                                      |  |  |  |
| 0                                      | under an HDHP at any time during 2023, enter your additional contribution amount. See instructions Add lines 6 and 7  | . 7<br>. 8   | 0.                                   |  |  |  |
| 8<br>9                                 |   |              | 3,850.                               |  |  |  |
| 9<br>10                                | Employer contributions made to your HSAs for 2023953Qualified HSA funding distributions10   | <u>/ .</u>   |                                      |  |  |  |
| 11                                     | Add lines 9 and 10  | . 11         | 537.                                 |  |  |  |
| 12                                     | Subtract line 11 from line 8. If zero or less, enter -0   |              | 3,313.                               |  |  |  |
| 13                                     | HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line   |              |                                      |  |  |  |
|  | Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.   |              |                                      |  |  |  |
| Part                                   | <b>II HSA Distributions.</b> If you are filing jointly and both you and your spouse each have so a separate Part II for each spouse.  | eparate      | 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 exce   |              |                                      |  |  |  |
|  | contributions (and the earnings on those excess contributions) included on line 14a that we   |              |                                      |  |  |  |
|  | withdrawn by the due date of your return. See instructions  | . <b>14b</b> |                                      |  |  |  |
| С                                      | Subtract line 14b from line 14a   | . <b>14c</b> | ;                                    |  |  |  |
| 15                                     | Qualified medical expenses paid using HSA distributions (see instructions)  |              |                                      |  |  |  |
| 16                                     | Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0 Also, include th amount in the total on Schedule 1 (Form 1040), Part I, line 8f  |              |                                      |  |  |  |
| 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 th   |              |                                      |  |  |  |
|  | are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (For 1040), Part II, line 17c   |              |                                      |  |  |  |
| Part                                   |   |              |                                      |  |  |  |
| - art                                  | completing this part. If you are filing jointly and both you and your spouse each have a complete a separate Part III for each spouse.  | separate     |                                      |  |  |  |
| 18                                     | Last-month rule   | . 18         |                                      |  |  |  |
| 19                                     | Qualified HSA funding distribution  |              |                                      |  |  |  |
| 20                                     | Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f   |              |                                      |  |  |  |
| 21                                     | Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (For   |              |                                      |  |  |  |
|  | 1040), Part II, line 17d  | . 21         |                                      |  |  |  |

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

BAA REV 02/11/24 PRO