# Electronic Filing Instructions for your 2022 Federal Tax Return Important: Your taxes are not finished until all required steps are completed.



Nagarjuna & Rajyalakshmi Panamala 2480 Crimson Downs Dr Cumming, GA 30040-5534

Balance Due/ Refund	Your federal tax return (Form 1 amount of \$2,214.00. Applicable refund amount of \$2,214.00. You chose to have your TurboTax feel receive e-mail from Green Dot E Your tax refund will be direct account information you entered Transit Number: 322271627.	e fees were our refund is es deducted fank, which hadeposited in	deducted from your original now \$2,159.00. Because you from your refund, you will nandles this transaction.							
When Will You Get Your Refund?	The IRS issued more than 9 out of 10 refunds to taxpayers in less than 21 days last year. The same results are expected in 2023. To get your estimated refund date from TurboTax, log into My TurboTax at www.turbotax.com. If you do not receive your refund within 21 days, or the amount you get is not what you expected, contact the Internal Revenue Service directly at 1-800-829-4477. You can also check www.irs.gov and select the "Where's my refund?" link.									
What You Need to Keep		cions (this f	corm)							
2022 Federal Tax Return Summary	Adjusted Gross Income	\$ \$ \$ \$ \$ \$	130,987.00 105,087.00 11,853.00 14,067.00 2,214.00 9.05%							

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

2022

OMB No. 1545-0074

IRS Use Only-Do not write or staple in this space.

Person is a child but not your dependent:  Your first name and middle initial   Last name   Ragriyuna   Panamala   Last name   Shouse's social security number   Rajyalakshmi   Panamala   T58-37-1934    Home address (number and street). If you have a P.O. box, see instructions.   Apt. no.   Presidential Election Campaign   Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not charge your lax or refund.   You   Spouse   State   ZIP code   GA   300405534    At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)   Yes   No   No   No   No   No   No   No   N	Filing Status Check only one box.				ed filing separately (						spou	se (QSS)	-
Nagarijuna   Panamala   Panamala   Rayalakshmi   Panamala   Spouse's social security number   Spouse   State   Zir Code	OHE DOX.				our spouse. It you t	HICCK	led the HOH of	I QUC	box, ent	er trie c	illiu 3	marne ii tir	5 qualifyilig
International and power in the name and middle initial   Panamala   758-37-1934   Panamala   7	Your first name	and mi	ddle initial	Last na	me					Y	our soc	cial security	y number
Panamala	Nagarjun	a		Pana	mala					8	80-4	1-8370	)
Presidential Election Campsion   2480 Crimson   Downs   Dr.	If joint return, sp	ouse's	first name and middle initial	Last na	me					Sp	Spouse's social security number		
City, town, or post office. If you have a foreign address, also complete spaces below.   State   ZiP code	Rajyalak	shmi	Ĺ	Pana	mala					7	58-3	37-1934	Į
Courty town or post office. If you have a foreign address, also complete spaces below.   GA   3004.055.34   stogo to this fund. Checking of province/state/country name   Foreign province/state/country   Foreign prost office. If you have a foreign address, also complete spaces below.   GA   3004.055.34   stogo to this fund. Checking of province/state/country   Foreign prost ode   Town of the province/state/country   Foreign prost ode   Town of the province/state/country   Foreign prost ode   Town of the province/state/country   Foreign prosts   Foreign prosts   Town of the province/state/country   Foreign posts   Town of the province/state/country   Foreign prosts   Town of the province/state/country   Foreign prosts   Town of the pr	Home address (	numbe	r and street). If you have a P.O. box, see	instructio	ons.				Apt. no.	Pı	esider	ntial Electio	n Campaigr
Clumming  Foreign country name  Foreign province/state/county	2480 Cri	msor	n Downs Dr										
Cumming Foreign country name Foreign province/estate/country Foreign province/estate/country Foreign province/estate/country Foreign province/estate/country Foreign province/estate/country Foreign postal code your tax or refund. you	City, town, or po	ost offic	ce. If you have a foreign address, also cor	nplete s	paces below.	Sta	ite	ZIP	code			· ·	•
Foreign province/state/county	Cumming					GA 300405534			4	_		_	
Digital Assets  At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)  Someone can calim:	Foreign country	name		F	oreign province/state	count	ty	Fore	ign postal c				Ü
Assets  sexchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions).												You	Spouse
Standard Deduction  Someone can claim:    You as a dependent    Your spouse as a dependent    Deduction  Age/Blindness  You:    Were born before January 2, 1958    Are blind    Spouse:    Was born before January 2, 1958    Is blind  Dependents  (see instructions):    (2) Social security    (3) Relationship    (4) Check the box if qualifies for (see instructions):    If more				•				•		. ,		□Yes	X No
Spouse itemizes on a separate return or you were a dual-status alien	-							4000	.,. (CCC III	ou dou	0110.)		
Dependents   (see instructions):   (1) First name					•		•						
If more	Age/Blindness	You:	☐ Were born before January 2, 19	958	Are blind Sp	ouse	: Was bor	rn be	fore Janua	ary 2, 1	958	ls bli	nd
If more than four dependents, see instructions and check here in the form of t	Dependents	(see	instructions):		(2) Social securit	y	(3) Relationsh	nip	(4) Check t	ne box i	f qualifi	ies for (see i	nstructions):
dependents, see instructions and check here . □  Income  Incom	If more	<b>(1)</b> Fi	rst name Last name		number		to you		Child t	ax credi	t (	Credit for oth	er dependents
see instructions and check here		Adi	ti K Panamala		947-94-910	7	Daughter		[		X		<
Income In		Abh	inav Panamala		060-61-944	6	Son		[	X			]
Income Attach Form(s) W-2 here. Also attach Forms W-2 are Also attach Forms W-2 fir tax was withheld. If you did not get a Form W-2, see instructions If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions  If you did not get a Form W-2, see instructions)  If you did not get a Form W-2, se									[				]
Attach Form(s) W-2 here. Also attach Forms W-2 here. Also attach Forms W-2 mere. Also attach Sch. B m	here								[				<u> </u>
Attach Forms W-2 here, Also attach Forms W-2 (see instructions)  4 Exployer-provided adoption benefits from Form 8839, line 29  4 December W-2 here, Also attach Forms W-2 (see instructions)  5 W-2 here, Also attach Forms W-2 (see instructions)  4 December W-2 here, Also attach Forms W-2 (see instructions)  5 Wages from Form 8919, line 6  6 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach Forms W-2 (see instructions)  1 December W-2 here, Also attach	Income	1a	Total amount from Form(s) W-2, bo	ox 1 (see	e instructions) .						1a	13	3,986.
W-2 here. Also attach Forms W-2G and 1099-R it tax was withheld. If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you did not get a Form W-2, see instructions.  If you dilined dividends and you will dividends and you will dend so you dividends.  If you did not get a Form W-2, see instructions.  If you dilined dividends and you will dividends and you will dend so you will dividends.  If you did not get a Form W-2, see instructions.  If you dilined dividends and you will dend so you will dividends.  If you dilined dividends and you will dend so you will dividends.  If you delect to use the lump-sum election method, check here (see instructions).  If you elect to use the lump-sum election method, check here (see instructions).  If you elect to use the lump-sum election method, check here (see instructions).  If you elect to use the lump-sum election for required, check here.  If you delect to use the lump-sum election for required, check here.  If you delect to use the lump-sum election form form you total income.  If you delect to use the lump-sum election form Schedule A, you will make you will have you wi		b	Household employee wages not re	ported	on Form(s) W-2 .						1b		
attach Forms W-2G and 1099-Ri Hax was withheld. If you did not get a Form W-2, see instructions.  Attach Sch. B. If required.  2a Tax-exempt interest	` '	С	Tip income not reported on line 1a	(see ins	structions)						1c		
1099-R if tax was withheld.  f Employer-provided adoption benefits from Form 8839, line 29  If you did not get a Form W-2, see instructions.  V-2, see instructions.  I Nontaxable combat pay election (see instructions)  I Add lines 1a through 1h  Attach Sch. B if required.  Attach Sch. B 2a Tax-exempt interest . 2a b Taxable interest . 2b 1.  Audiffied dividends . 3a b Ordinary dividends . 3b O.  Brandard Deduction for Single or Married filing separately, \$12,950		d	Medicaid waiver payments not repe	orted or	n Form(s) W-2 (see	instru	uctions)				1d		
was withheld. If you did not get a Form W-2, see instructions.  Attach Sch. B if required.  4a Ray Capable of Beautiful Branch of Branch		е	Taxable dependent care benefits fr	om For	m 2441, line 26						1e		
h Other earned income (see instructions)  In Mortaxable combat pay election (see instructions)  It is 133,986.  Attach Sch. B if required.  At		f	Employer-provided adoption benef	fits from	Form 8839, line 29						1f		
W-2, see instructions.  I Nontaxable combat pay election (see instructions)  Add lines 1a through 1h  Attach Sch. B if required.  2a	If you did not	g	Wages from Form 8919, line 6 .								1g		
Instructions.  In Nontaxable combat pay election (see instructions)  It and lines 1 a through 1 h  It and lines 1 a through 1 and 1 a and 1 a and 1 and 1 a and 1 and 1 a and 1 a and 1 and 1 a and 1 and 1 a an		h	Other earned income (see instruction	ons) .				,			1h		0.
Attach Sch. B If required.  2a		i	Nontaxable combat pay election (s	ee instr	uctions)		1i	i					
If required.  3a Qualified dividends 3a b Ordinary dividends 4b Deduction Standard  4a IRA distributions 4a b Taxable amount 5b  5a b Taxable amount 5b  5a b Taxable amount 6b  5b Taxable amount 7b  5c Single or Married filing separately, \$12,950		Z	Add lines 1a through 1h	. , .							1z	13	3 <b>,</b> 986.
4a IRA distributions		<b>2</b> a	Tax-exempt interest 2	2a		b T	axable interest	t			2b		
Standard Deduction for—Single or Married filing separately, \$12,950	if required.	<u>3a</u>	Qualified dividends	За		<b>b</b> C	ordinary divide	nds			3b		0.
Ceduction for—Single or Married filing separately, \$12,950  Married filing jointly or Qualifying surviving spouse, \$25,900  Head of household, \$19,400  If you checked any box under Standard Deduction, 15  Suptract line 10 from line 11 If zero or less enter -0- This is your taxable income  b Taxable amount		4a	IRA distributions 4	la							4b		
Single or Married filing separately, \$12,950  Married filing jointly or Qualifying surviving spouse, \$25,900  Head of household, \$19,400  If you checked any box under Standard Deduction, 15  Add lines 12 and 13  Social security berients		5a	<del></del>	_									
Married filing separately, \$12,950  Married filing jointly or Qualifying surviving spouse, \$25,900  Head of household, \$19,400  If you elect to use the lump-sum election method, check here (see instructions)  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not required, check here  Capital gain or (loss). Attach Schedule D if required. If not req		6a						ıt .			6b		
\$12,950  Married filing jointly or Qualifying surviving spouse, \$25,900  Head of household, \$19,400  If you checked any box under Standard Deduction, Deduction, Deduction, Deduction, Deduction, Deduction, Deduction, Defects of the standard Deduction, 15  Subtract line 10 from line 11 lf zero or less enter -0- This is your taxable income  Other income from Schedule 1, line 10  Add lines 12, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income  Add lines 12, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income  9 130,987  10 Subtract line 10 from line 9. This is your adjusted gross income  11 130,987  12 25,900  13 Qualified business income deduction from Form 8995 or Form 8995-A  14 25,900  15 Subtract line 14 from line 11 lf zero or less enter -0- This is your taxable income	Married filing		,		*	`	,			. 📙			
jointly or Qualifying spouse, \$25,900 Head of household, \$19,400 If you checked any box under Standard Deduction, Deduction, Deduction, Deduction, 15 Subtract line 14 from line 11 If zero or less enter -0- This is your taxable income  9 130,987.  9 130,987.  9 130,987.  9 130,987.  10 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income  10 Subtract line 10 from line 9. This is your adjusted gross income 11 130,987.  12 25,900.  13 Qualified business income deduction from Form 8995 or Form 8995-A  14 25,900.			, ,							. Ш		-	
Qualifying surviving spouse, \$25,900     4d lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income     9     130, 987.       Head of household, \$19,400     12     Subtract line 10 from line 9. This is your adjusted gross income     11     130, 987.       If you checked any box under Standard Deduction, \$12     Add lines 12 and 13     13       Deduction, \$25,900.       15     Subtract line 14 from line 11. If zero or less enter -0. This is your taxable income			,								_		
Standard deduction or itemized deductions (from 8995 or Form 8995-A  Add lines 12 and 13  Add lines 12 and 13  Subtract line 10 from line 9. This is your adjusted gross income  11 130,987.  12 25,900.  13 Qualified business income deduction from Form 8995 or Form 8995-A  14 25,900.  15 Subtract line 14 from line 1.1 If zero or less enter -0. This is your taxable income	Qualifying											13	0,987.
household, \$19,400  If you checked any box under Standard  Deduction,  Deduction,  Deduction,  12  Standard deduction or itemized deductions (from Schedule A)			•					•					
\$19,400  If you checked any box under Standard Deduction, Deduction, Deduction, 12  Standard deduction or itemized deductions (from Schedule A)				•	•			•					
any box under Standard  14 Add lines 12 and 13					`	,						2	<u>5,900.</u>
Standard         14         Add lines 12 and 13         1													
	Standard												
		15	Subtract line 14 from line 11. If zero	or less	s, enter -0 This is	your t	taxable incom	ne			15	10	5,087.

Form 1040 (2022	2)								Page <b>2</b>
Tax and	16	Tax (see instructions). Check	if any from Form	(s): <b>1</b> 881	4 <b>2</b> 🗌 4972	3 🗌		16	14,353.
Credits	17	Amount from Schedule 2, lir	ne 3					17	
	18	Add lines 16 and 17						18	14,353.
	19	Child tax credit or credit for	other dependen	ts from Sched	ule 8812			19	2,500.
	20	Amount from Schedule 3, lir	ne 8					20	
	21	Add lines 19 and 20						21	2,500.
	22	Subtract line 21 from line 18	. If zero or less,	enter -0				22	11,853.
	23	Other taxes, including self-e	mployment tax,	from Schedule	e 2, line 21			23	0.
	24	Add lines 22 and 23. This is	your <b>total tax</b>					24	11,853.
Payments	25	Federal income tax withheld							
•	а	Form(s) W-2				25a 14	1,067		
	b	Form(s) 1099				25b			
	С	Other forms (see instruction	s)			25c			
	d	Add lines 25a through 25c						25d	14,067.
If you have a	26	2022 estimated tax paymen	ts and amount a	pplied from 20	21 return			26	
qualifying child,	27	Earned income credit (EIC)			No .	27			
attach Sch. EIC.	28	Additional child tax credit from	m Schedule 8812	2		28			
	29	American opportunity credit	from Form 8863	3, line 8		29			
	30	Reserved for future use .				30			
	31	Amount from Schedule 3, lir				31			
	32	Add lines 27, 28, 29, and 31				ndable credits		32	
	33	Add lines 25d, 26, and 32. T	hese are your <b>to</b>	tal payments				33	14,067.
Refund	34	If line 33 is more than line 24						34	2,214.
neiuliu	35a	Amount of line 34 you want	refunded to you	یا. If Form 8888	is attached, chec	k here	🗆	35a	2,214.
Direct deposit?	b	Routing number 3 2 2					Savings		
See instructions.	d	Account number 7 2 0	7 7 1 8	1 0					
	36	Amount of line 34 you want	applied to your	2023 estimate	ed tax	36			
Amount You Owe	37	Subtract line 33 from line 24							
rou Owe		For details on how to pay, g				1 1		37	
Third Party	<b>38</b>	Estimated tax penalty (see in you want to allow another				38   See			
Designee		structions	•				omplete	below.	<b>⋉</b> No
3	De	signee's		Phone		Pers	onal iden	tification	
	nar	me		no.		num	ber (PIN)		
Sign		der penalties of perjury, I declare tief, they are true, correct, and com							
Here	Yo	ur signature		Date	Your occupation		lf ti	ne IRS se	nt you an Identity
		S			· ·				IN, enter it here
Joint return?					Software E			e inst.)	
See instructions. Keep a copy for	Sp	Spouse's signature. If a joint return, <b>both</b> must sign.							nt your spouse an ection PIN, enter it here
your records.					Homemaker			e inst.)	Cultural III, enter it here
	———	one no. (818)404-986	5	Email address	пошешакет				
		eparer's name	Preparer's signat			Date	PTIN		Check if:
Paid		The second	l span are a signar	Date F					Self-employed
Preparer	———	m's name Self-Pr	enared			l	Ph	one no.	
Use Only		m's address	cparca					m's EIN	

## SCHEDULE D (Form 1040)

Department of the Treasury

Internal Revenue Service

### **Capital Gains and Losses**

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12** 

	e(s) shown on return					ecurity number
	garjuna & Rajyalakshmi Panamala				0-41-	8370
	you dispose of any investment(s) in a qualified opportunity es," attach Form 8949 and see its instructions for additional	•	•	_		
Pa	Short-Term Capital Gains and Losses—Ge	nerally Assets I	Held One Year	or Less (	see ins	structions)
lines This	instructions for how to figure the amounts to enter on the below.  form may be easier to complete if you round off cents to le dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustm to gain or lo Form(s) 894 line 2, colu	ss from 9, Part I,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result 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	35,106.	54,408.	1,	,281.	-18,021.
2	Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked					
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 (le	oss) from Forms 4	684, 6781, and 88	324	4	
5	Net short-term gain or (loss) from partnerships, Schedule(s) K-1	•		rusts from	5	
6	Short-term capital loss carryover. Enter the amount, if an <b>Worksheet</b> in the instructions		our <b>Capital Loss</b>		6	( 40,533.
7	Net short-term capital gain or (loss). Combine lines 1a term capital gains or losses, go to Part II below. Otherwise			e any long- 	7	-58,554.
Pai	rt II Long-Term Capital Gains and Losses—Ger	nerally Assets H	leld More Than	One Yea	r (see	instructions)
lines This	instructions for how to figure the amounts to enter on the below.  form may be easier to complete if you round off cents to le dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustm to gain or lo Form(s) 8949 line 2, colu	ss from 9, Part II,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
	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.			iii 2, 60ic	(9)	with column (g)
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	
	Net long-term gain or (loss) from partnerships, S corporat	ions, estates, and	trusts from Sched	dule(s) K-1	12	
	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	through 14 in co	olumn (h). Then, g	o to Part III		

BAA

Schedule D (Form 1040) 2022 Page 2

#### Part III **Summary** -58,554. 16 Combine lines 7 and 15 and enter the result 16 • If line 16 is a gain, 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 loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete • If line 16 is zero, 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 both gains? ☐ **Yes.** Go to line 18. No. Skip lines 18 through 21, and go to line 22. 18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet . . . . . . . . . . . . . . . . . . 18 19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet . 19 20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☐ 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. □ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below. If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: 21 • The loss on line 16; or 21 3,000.) • (\$3,000), or if married filing separately, (\$1,500) Note: When figuring which amount is smaller, treat both amounts as positive numbers. Do you have gualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? 22 ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.

#### **Sales and Other Dispositions of Capital Assets**

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

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

OMB No. 1545-0074

2022
Attachment Sequence No. 12A

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

Social security number or taxpayer identification number

880-41-8370

Nagarjuna & Rajyalakshmi Panamala

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.

Part I Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see 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.

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

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the <b>Note</b> below and see <i>Column</i> (e) in the separate instructions.	See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
15.00sh of AAPL 03/18/2022 CALL \$165.00	Various	03/18/22	30.	225.			-195.
2.00sh of AAPL 04/29/2022 CALL \$165.00	04/28/22	04/29/22	300.	600.			-300.
8.00sh of AAPL 05/06/2022 CALL \$165.00	Various	05/04/22	606.	809.	W	159.	-44.
9.00sh of AAPL 05/13/2022 CALL \$165.00	Various	05/13/22	0.	644.			-644.
2.00sh of AAPL 11/04/2022 PUT \$145.00	10/28/22	11/01/22	140.	90.			50.
2.00sh of AMD 02/25/2022 CALL \$120.00	02/11/22	02/14/22	852.	540.			312.
2.00sh of AMD 02/25/2022 CALL \$120.00	02/14/22	02/15/22	765.	560.			205.
3.00sh of AMD 02/25/2022 CALL \$120.00	02/16/22	02/22/22	785.	1,110.	W	325.	0.
2.00sh of AMD 02/25/2022 CALL \$120.00	Various	02/24/22	16.	510.			-494.
5.00sh of AMD 05/13/2022 CALL \$100.00	Various	05/06/22	980.	855.	W	20.	145.
2.00sh of AMZN 01/20/2023 CALL \$100.00	Various	11/11/22	1,370.	1,150.	W	90.	310.
2.00sh of AMEN 03/18/2022 CALL \$3,500.00	Various	03/18/22	6.	185.			-179.
2.00sh of AMZN 10/21/2022 CALL \$115.00	10/14/22	10/17/22	324.	280.			44.
1.00sh of AMZN 10/28/2022 CALL \$120.00	10/26/22	10/26/22	360.	230.			130.
2 Totals. Add the amounts in columns negative amounts). Enter each total Schedule D, line 1b (if Box A above above is checked), or line 3 (if Box C).	6,534.	7,788.		594.	-660.		

#### **Sales and Other Dispositions of Capital Assets**

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

OMB No. 1545-0074

2022
Attachment Sequence No. 12A

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

es 1b, 2, 3, 8b, 9, and 10 of Schedule D. Sequence No. 1:

Social security number or taxpayer identification number

880-41-8370

Nagarjuna & Rajyalakshmi Panamala

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.

Part I

**Short-Term.** Transactions involving capital assets you held 1 year or less are generally short-term (see 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)
- (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

1		(0)	(4)	(e) Cost or other basis	If you enter an	f any, to gain or loss amount in column (g), ode in column (f).	(h) Gain or (loss) Subtract column (e) from column (d) and	
(a)  Description of property	(b) Date acquired	(c) Date sold or disposed of	(d) Proceeds (sales price)	See the <b>Note</b> below and see <i>Column (e)</i>		parate instructions.		
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	(Mo., day, yr.)	(see instructions)	in the separate instructions.	(f) (g) Code(s) from instructions Amount of adjustment		combine the result with column (g).	
3.00sh of BA 05/20/2022 CALL \$150.00	05/09/22	05/20/22	0.	300.			-300.	
2.00sh of BABA 02/11/2022 CALL \$120.00	02/07/22	02/08/22	840.	440.			400.	
2.00sh of BABA 02/11/2022 CALL \$125.00	02/09/22	02/09/22	700.	400.			300.	
_1.00sh of COST 05/27/2022 CALL \$500.00	05/20/22	05/27/22	0.	80.			-80.	
1.00sh of CRM 04/29/2022 CALL \$180.00	04/22/22	04/25/22	160.	150.			10.	
4.00sh of CRM 05/13/2022 CALL \$190.00	Various	05/13/22	0.	214.			-214.	
4.00sh of DOCU 01/14/2022 CALL \$155.00	Various	01/13/22	12.	350.			-338.	
4.00sh of FB 02/18/2022 CALL \$250.00	Various	02/14/22	48.	410.			-362.	
2.00sh of GOOGL 01/20/2023 CALL \$100.00	Various	11/11/22	850.	802.			48.	
3.00sh of GPS 03/11/2022 CALL \$15.00	03/04/22	03/07/22	120.	84.			36.	
7.00sh of META 01/20/2023 CALL \$135.00	Various	11/09/22	700.	586.			114.	
1.00sh of MRNA 01/07/2022 CALL \$280.00	01/03/22	01/06/22	5.	100.			-95.	
1.00sh of MRNA 02/18/2022 CALL \$150.00	02/14/22	02/15/22	470.	385.			85.	
1.00sh of MSFT 01/20/2023 CALL \$250.00	10/26/22	10/28/22	815.	750.			65.	
2 Totals. Add the amounts in columns negative amounts). Enter each total								
Schedule D, line 1b (if Box A above above is checked), or line 3 (if Box (	is checked), lir	ne 2 (if Box B	4,720.	5,051.			-331.	

#### **Sales and Other Dispositions of Capital Assets**

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

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

OMB No. 1545-0074

2022

Attachment
Sequence No. 12A

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

Social security number or taxpayer identification number

880-41-8370

Nagarjuna & Rajyalakshmi Panamala

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.

Part I

**Short-Term.** Transactions involving capital assets you held 1 year or less are generally short-term (see 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)
- (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

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the <b>Note</b> below and see <i>Column</i> (e) in the separate instructions.	See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
1.00sh of NVDA 01/20/2023 CALL \$200.	00 11/16/22	12/01/22	350.	350.		-	0.
2.00sh of NVDA 05/06/2022 CALL \$200.	00 04/27/22	04/28/22	1,120.	520.			600.
1.00sh of NVDA 05/06/2022 CALL \$200.	00 04/29/22	05/02/22	355.	300.			55.
1.00sh of NVDA 06/16/2023 CALL \$200.	00 11/14/22	11/15/22	1,750.	1,360.			390.
2.00sh of PINS 03/18/2022 CALL \$30.	00 02/04/22	02/07/22	330.	260.			70.
1.00sh of PTON 02/11/2022 CALL \$40.	00 02/08/22	02/09/22	106.	201.			-95.
1.00sh of PTON 02/11/2022 PUT \$35.	00 02/08/22	02/09/22	54.	209.			-155.
6.00sh of RBLX 03/18/2022 CALL \$60.	00 Various	03/16/22	12.	610.			-598.
1.00sh of RIVN 01/20/2023 CALL \$35.	00 11/09/22	11/10/22	350.	200.			150.
3.00sh of SNAP 01/07/2022 CALL \$50.	00 01/03/22	01/04/22	9.	72.			-63.
6.00sh of SNAP 01/20/2023 CALL \$40.	00 Various	12/01/22	6.	1,200.			-1,194.
19.00sh of SNAP 03/11/2022 CALL \$40.	00 Various	03/10/22	38.	845.			-807.
2.00sh of SNAP 03/18/2022 CALL \$50.	00 01/04/22	01/12/22	500.	450.			50.
10.00sh of SNAP 03/18/2022 CALL \$50.	00 Various	02/04/22	885.	1,038.	W	317.	164.
2 Totals. Add the amounts in colur negative amounts). Enter each Schedule D, line 1b (if Box A ababove is checked), or line 3 (if Box A above is checked).	nns (d), (e), (g), and cotal here and incove is checked), link C above is checked	lude on your ne 2 (if Box B cked) .	5,865.	7,615.		317.	-1,433.

#### **Sales and Other Dispositions of Capital Assets**

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2022 Attachment Sequence No. 12A

OMB No. 1545-0074

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

Social security number or taxpayer identification number

880-41-8370

Nagarjuna & Rajyalakshmi Panamala

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(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the <b>Note</b> below and see <i>Column</i> (e) in the separate instructions.	See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
3.00sh of SNAP 06/17/2022 CALL \$30.00	04/28/22	04/28/22	750.	600.			150.
3.00sh of SNAP 10/21/2022 CALL \$11.00	10/20/22	10/21/22	0.	285.			-285.
1.00sh of TSLA 01/20/2023 CALL \$250.00	10/25/22	11/01/22	1,925.	1,400.			525.
3.00sh of TSLA 02/18/2022 CALL \$950.00	Various	02/14/22	965.	805.			160.
2.00sh of TSLA 03/04/2022 CALL \$900.00	Various	02/28/22	1,800.	1,165.	W	250.	885.
1.00sh of TSLA 03/11/2022 CALL \$900.00	03/07/22	03/09/22	300.	200.			100.
8.00sh of TSLA 04/29/2022 CALL \$1,000.00	Various	04/29/22	0.	464.			-464.
3.00sh of TSLA 05/06/2022 CALL \$1,000.00	Various	05/04/22	850.	730.	W	120.	240.
1.00sh of TSLA 10/21/2022 CALL \$220.00	10/14/22	10/17/22	810.	520.			290.
2.00sh of TSLA 10/28/2022 CALL \$220.00	10/20/22	10/21/22	880.	650.			230.
2.00sh of TSLA 10/28/2022 CALL \$220.00	10/24/22	10/25/22	650.	290.			360.
5.00sh of 88160R101 TESLA, INC. COMMON STOCK	10/19/22	10/25/22	1,119.	1,113.			6.
JFROG LTD ILSO.01 50	02/12/21	01/03/22	1,505.	3,300.			-1,795.
JFROG LTD ILSO.01 25	02/22/21	01/03/22	753.	1,560.			-807.
2 Totals. Add the amounts in columns negative amounts). Enter each total Schedule D, line 1b (if Box A above above is checked), or line 3 (if Box C).	12,307.	13,082.		370.	-405.		

## 8949

#### **Sales and Other Dispositions of Capital Assets**

Go to www.irs.gov/Form8949 for instructions and the latest information. File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D. OMB No. 1545-0074 Attachment Sequence No. 12A

Department of the Treasury Internal Revenue Service

Social security number or taxpayer identification number

880-41-8370

Nagarjuna & Rajyalakshmi Panamala

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- (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

1 (a) Description of property	(b) Date acquired	(c) Date sold or	<b>(d)</b> Proceeds	(e) Cost or other basis See the <b>Note</b> below	If you enter an enter a c	f any, to gain or loss amount in column (g), ode in column (f). parate instructions.		
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of (Mo., day, yr.)	(sales price) (see instructions)	and see Column (e) in the separate instructions.	(f) Code(s) from instructions	<b>(g)</b> Amount of adjustment		
JFROG LTD ILS0.01 25	02/24/21	01/03/22	753.	1,463.			-710.	
PALANTIR TECHNOLOGIES INC CL A 20	02/08/21	01/24/22	238.	750.			-512.	
PALANTIR TECHNOLOGIES INC CL A 30	02/08/21	01/24/22	356.	1,413.			-1,057.	
PALANTIR TECHNOLOGIES INC CL A 30	02/08/21	01/24/22	356.	1,475.			-1,119.	
PALANTIR TECHNOLOGIES INC CL A 50	02/08/21	01/24/22	594.	1,975.			-1,381.	
SORRENTO THERAPEUTICS INC COMUSD 200	02/12/21	01/24/22	614.	2,990.			-2,376.	
PALANTIR TECHNOLOGIES INC CL A 20	02/15/21	01/24/22	238.	965.			-727.	
FUBOTV INC COM 75	02/22/21	01/24/22	680.	3,150.			-2,470.	
SORRENTO THERAPEUTICS INC COMUSD 100	02/23/21	01/24/22	307.	1,147.			-840.	
C3 AI INC CL A 10	03/02/21	01/24/22	228.	1,035.			-807.	
FUELCELL ENERGY INC COM 100	03/11/21	01/24/22	352.	1,850.			-1,498.	
FUBOTV INC COM 25	03/11/21	01/24/22	227.	788.			-561.	
PALANTIR TECHNOLOGIES INC CL A 30	03/11/21	01/24/22	356.	776.			-420.	
FUBOTV INC COM 25	05/28/21	01/24/22	227.	600.			-373.	
2 Totals. Add the amounts in columns negative amounts). Enter each total	al here and inc	lude on your						
Schedule D, <b>line 1b</b> (if <b>Box A</b> above above is checked), or <b>line 3</b> (if <b>Box</b> 6)			5,526.	20,377.			-14,851.	

## 8949

#### **Sales and Other Dispositions of Capital Assets**

Go to www.irs.gov/Form8949 for instructions and the latest information. File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D. OMB No. 1545-0074 Attachment Sequence No. 12A

Department of the Treasury Internal Revenue Service

Social security number or taxpayer identification number

880-41-8370

Nagarjuna & Rajyalakshmi Panamala

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.

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 Part I Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see 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. X (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above) (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 Adjustment, if any, to gain or loss 1 (h) If you enter an amount in column (g), enter a code in column (f)

(a)	(b) Doto o	(c) Date sold or	(d) Proceeds	Cost or other basis See the <b>Note</b> below		ode in column (f).  parate instructions.	Gain or (loss) Subtract column (e)
Description of property (Example: 100 sh. XYZ Co.)	Date acquired (Mo., day, yr.)	disposed of (Mo., day, yr.)	(sales price) (see instructions)	and see Column (e) in the separate instructions.	(f) Code(s) from instructions	<b>(g)</b> Amount of adjustment	from column (d) and combine the result with column (g).
SORRENTO THERAPEUTICS INC COMUSD 50	06/28/21	01/24/22	154.	495.			-341.
2 Totals. Add the amounts in columns negative amounts). Enter each tota Schedule D, line 1b (if Box A above	al here and inc is checked), <b>lir</b>	lude on your ne 2 (if Box B					
above is checked), or line 3 (if Box	C above is chec	ked)	154.	495.			-341.

#### SCHEDULE 8812 (Form 1040)

### **Credits for Qualifying Children** and Other Dependents

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

OMB No. 1545-0074

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

Go to www.irs.gov/Schedule8812 for instructions and the latest information.

Attachment Sequence No. **47** Your social security number 880\_41\_8370

laga	rjuna & Rajyalakshmi Panamala	880-	41-8	3370
Pai	Child Tax Credit and Credit for Other Dependents			
1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR		1	130,987.
2a	Enter income from Puerto Rico that you excluded			
b	Enter the amounts from lines 45 and 50 of your Form 2555	0.		
c	Enter the amount from line 15 of your Form 4563			
d	Add lines 2a through 2c		2d	0.
3	Add lines 1 and 2d	. [	3	130,987.
4	Number of qualifying children under age 17 with the required social security number  4	1		
5	Multiply line 4 by \$2,000		5	2,000.
6	Number of other dependents, including any qualifying children who are not under age 17 or who do not have the required social security number	1		
	alien. Also, do not include anyone you included on line 4.	JCIII		
7	Multiply line 6 by \$500		7	500.
8	Add lines 5 and 7	-	8	2,500.
9	Enter the amount shown below for your filing status.	·		2,300.
	• Married filing jointly—\$400,000			
	• All other filing statuses—\$200,000 \\		9	400,000.
10	Subtract line 9 from line 3.	·		100,000.
10	• If zero or less, enter -0			
	• If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For			
	example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc.		10	0.
11	Multiply line 10 by 5% (0.05)		11	0.
12	Is the amount on line 8 more than the amount on line 11?		12	2,500.
	No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit parts II-A and II-B. Enter -0- on lines 14 and 27.	_		273000
12	Yes. Subtract line 11 from line 8. Enter the result.		12	11.050
13	Enter the amount from the Credit Limit Worksheet A		13	14,353.
14	Enter the smaller of line 12 or 13. This is your child tax credit and credit for other dependents	· L	14	2,500.
	Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.			
	If the amount on line 12 is more than the amount on line 14, you may be able to take the <b>addition</b> on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-N (also complete Schedule 3, line 11) before completing Part II-A.			
or Pa	perwork Reduction Act Notice, see your tax return instructions.  BAA REV 03/22/23 TTMac	Sche	dule 88	12 (Form 1040) 202

Schedule 8812 (Form 1040) 2022 Page **2** 

Part	II-A Additional Child Tax Credit for All Filers		•
Cautio	on: If you file Form 2555, you cannot claim the additional child tax credit.		
15	Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lin	e 27 .	
16a	Subtract line 14 from line 12. If zero, stop here; you cannot take the additional child tax credit. Skip Parts II-A		
	and II-B. Enter -0- on line 27	16a	0.
b	Number of qualifying children under 17 with the required social security number: x \$1,500.		
	Enter the result. If zero, <b>stop here</b> ; you cannot claim the additional child tax credit. Skip Parts II-A and II-B.		
	Enter -0- on line 27	16b	
	<b>TIP:</b> The number of children you use for this line is the same as the number of children you used for line 4.		
17	Enter the <b>smaller</b> of line 16a or line 16b	17	
18a	Earned income (see instructions)		
b	Nontaxable combat pay (see instructions)		
19	Is the amount on line 18a more than \$2,500?		
	No. Leave line 19 blank and enter -0- on line 20.		
	Yes. Subtract \$2,500 from the amount on line 18a. Enter the result 19		
20	Multiply the amount on line 19 by 15% (0.15) and enter the result $\dots \dots \dots \dots \dots \dots \dots \dots \dots \dots$	20	
	Next. On line 16b, is the amount \$4,500 or more?		
	No. If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the		
	smaller of line 17 or line 20 on line 27.		
	Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27.		
	Otherwise, go to line 21.	( )	. 5.
	II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Resident	S Of P	uerto Rico
21	Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2,		
	boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If		
	your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, see		
	instructions	-	
22	Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form		
22	1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13 . 22	-	
23	Add lines 21 and 22	-	
24	1040 and 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27,		
	and Schedule 3 (Form 1040), line 11.		
	1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11.		
25	Subtract line 24 from line 23. If zero or less, enter -0	25	
26	Enter the <b>larger</b> of line 20 or line 25	26	
20	Next, enter the smaller of line 26 on line 27.	20	
Part	II-C Additional Child Tax Credit		
27	This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28.	27	
	This is your manifolds child and create. Lines this amount on Point 1979, 1979-513, or 1979-1913, fine 20.	-/	

**SCHEDULE D AMT** 

#### Capital Gains and Losses as Refigured for the Alternative Minimum Tax

► Keep for your records

Name(s) shown on return Nagarjuna & Rajyalakshmi Panamala Your social security number 880-41-8370

Part I	Short-Term Capital Gains and Losses — Assets Held One Year or Less

QuickZoom to Form(s) 8949, Short-Term Gain (Loss) Transactions . . . . . . . . ▶ QuickZoom to Schedule D, Short-Term Gain (Loss) Regular Tax Totals . . . . . . ▶

	Short-Term Totals:	Sales Price	Adjstd Basis	Gn(Ls) Adjstmt	Gain (Loss)
	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 Short-term totals from all Forms 8949 with box A checked Short-term totals from all Forms 8949 with box B checked Short-term totals from all Forms 8949 with box C checked	35,106.	54,408.	1,281.	-18,021.
5 6 7	Short-term gain from Form 6252 ar Forms 4684, 6781, and 8824:  A Form(s) 6252, Installment Sale IB Form(s) 4684, Casualties and TC Form(s) 6781, Gains and Losse Contracts and Straddles  D Form(s) 8824, Like-Kind Exchar E Sale of Incentive Stock Option sentered elsewhere)  F Other		-47,197. -65,218.		

#### Part II **Long-Term Capital Gains and Losses — Assets Held More Than One Year**

QuickZoom to Form(s) 8949, Long-Term Gain (Loss) Transactions . . . . . . . . QuickZoom to Schedule D, Long-Term Gain (Loss) Regular Tax Totals . . . . . . ▶

ı	Long-Term Totals:	Sales Price	Adjstd Basis	Gn(Ls) Adjstmt	Gain (Loss)
	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 Long-term totals from all Forms 8949 with box D checked Long-term totals from all Forms 8949 with box E checked				
10	Long-term totals from all Forms 8949 with box F checked				

12 13 14 15	Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824:  A Form 4797, Sales of Business Property (Gain from Pt I)  B Form(s) 6252, Installment Sale Income  C Form(s) 4684, Casualties and Thefts  D Form(s) 6781, Gains and Losses from Section 1256 Contracts and Straddles  E Form(s) 8824, Like-Kind Exchanges  F Form(s) 2439, Notice to Shareholder of Undistributed Long-Term Capital Gains  G Sale of Incentive Stock Option stock (not entered elsewhere)  H Other  Total  Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1  Capital gain distributions  Long-term capital loss carryover. Enter the amount, if any, from line 15 of your Capital Loss Carryover Worksheet  Net long-term capital gain or (loss). Combine lines 8 thru 14 in column (f)	11 12 13 14 15	
Part	III Summary		
16	Combine lines 7 and 15 and enter the result	16	-65,218.
17	Are lines 15 and 16 <b>both</b> gains?  Yes. Go to line 18.  No. Skip lines 18 through 21, and go to line 22.		
18	Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet	18	0.
19	Enter the amount, if any, from line 18 of the Unrecaptured Section 1250  Gain Worksheet	19	
20	Are lines 18 and 19 <b>both</b> zero or blank?  Yes.  No.		
21	If line 16 is a loss, enter here and on line 22 below, the <b>smaller</b> of:  • The loss on line 16, or  • (\$3,000), or, if married filing separately, (\$1,500)  Note: When figuring which amount is smaller, treat both amounts as positive numbers.	21	-3,000.
22	Do you have qualified dividends on Form 1040, line 9b?  Yes.  No.  Capital gain (loss) as refigured for the Alternative Minimum Tax.  If line 16 is a gain or zero, enter line 16. If line 16 is a loss,		
Quic Quic Quic Quic	kZoom to the Qualified Dividends and Capital Gain Tax Worksheet		► ► ►

# Tax History Report ► Keep for your records

Name(s) Shown on Return

Nagarjuna & Rajyalakshmi Panamala

	Five Year Tax History:							
	2018	2019	2020	2021	2022			
Filing status	MFJ	MFJ	MFJ	MFJ	MFJ			
Total income	95,072.	121,430.	133,333.	86,190.	130,987.			
Adjustments to income			300.					
Adjusted gross income	95,072.	121,430.	133,033.	86,190.	130,987.			
Tax expense	5,838.	10,000.	10,000.	8,601.	6,500.			
Interest expense	8,463.	18,418.	11,333.	5,425.	12,401.			
Contributions		100.	2,000.	1,000.	1,000.			
Misc. deductions								
Other itemized ded'ns					0.			
Total itemized/ standard deduction	24,000.	28,518.	24,800.	25,600.	25,900.			
Exemption amount	0.	0.	0.	0.	0.			
QBI deduction				1.				
Taxable income	71,072.	92,912.	108,233.	60,589.	105,087.			
Tax	8,100.	12,141.	15,385.	6,871.	14,353.			
Alternative min tax								
Total credits	2,500.	2,500.	2,500.	500.	2,500.			
Other taxes	0.							
Payments	8,888.	12,984.	16,852.	10,596.	14,067.			
Form 2210 penalty								
Amount owed								
Applied to next year's estimated tax .								
Refund	3,288.	3,343.	3,967.	4,225.	2,214.			
Effective tax rate %	5.89	7.94	9.69	4.26	9.05			
**Tax bracket %	12.0	22.0	22.0	12.0	22.0			

<sup>\*\*</sup>Tax bracket % is based on Taxable income.

#### IMPORTANT DISCLOSURES

If you are owed federal tax refund(s), you have a right to choose how you will receive the refund(s). There are several options available to you. Some options cost money and some options are free. Please read about these options below.

You can file your federal tax return(s) electronically or by paper and obtain your federal tax refund(s) directly from the Internal Revenue Service ("IRS") for free. If you file your tax return(s) electronically, you can receive refund checks directly from the IRS through the U.S. Postal Service in 21 to 28 days from the time you file your tax return(s) or the IRS can deposit your refund(s) directly into your bank account in less than 21 days from the time you file your tax return(s) unless there are delays by the IRS. If you file a paper return through the U.S. Postal Service, you can receive refund checks directly from the IRS through the U.S. Postal Service in 6 to 8 weeks from the time the IRS receives your return(s) or the IRS can deposit your refund(s) directly into your bank account in 6 to 8 weeks from the time the IRS receives your return(s). However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2023.

You can file your federal tax return(s) electronically, select the Refund Processing Service ("RPS") for an additional fee of \$40.00 (the "RPS fee"), and have your federal tax refund(s) processed through a processor using banking services of a financial institution. The RPS allows your refund(s) to be deposited into a bank account at Green Dot Bank ("Bank") and deducts your TurboTax fees and other amounts that you authorize from your federal refund(s). The balance of your federal refund(s) is delivered to you via the disbursement method you select. If you file your tax return(s) electronically and select the RPS, the IRS will deposit your refund(s) with Bank. Upon Bank's receipt of your refund(s), Santa Barbara Tax Products Group, LLC, a division of Green Dot Corporation, a Delaware corporation, a processor, will deduct from your federal refund(s) the RPS fee, any fees charged by TurboTax for the preparation and filing of your tax return(s) and any other amounts authorized by you and disburse the balance of your refund proceeds to you. Unless there are unexpected delays, federal refunds are received in less than 21 days from the time you file your tax return(s) electronically. However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2023.

The RPS is not necessary to obtain your refund(s). If you have an existing bank account, you do not need to use the RPS, which requires the payment of a fee, in order to receive a direct deposit from the IRS. You may consult the IRS website (IRS.gov) for information about tax refund processing.

If you select the RPS, no prior debt you may owe to Bank will be deducted from your refund(s).

You can change your income tax withholdings which might result in you receiving additional funds throughout the year rather than waiting to receive these funds potentially in tax refund(s) next year. Please consult your employer or tax advisor for additional details.

This Agreement requires all disputes to be resolved by way of binding arbitration. The terms of the arbitration provision appear in Section 11.

Information regarding low-cost deposit accounts may be available at <a href="www.mymoney.gov">www.mymoney.gov</a>

The chart below shows the options for filing your federal tax returns (e-file or paper returns), the RPS product, refund disbursement options, estimated timing for obtaining your federal tax refund proceeds, and costs associated with the various options.

WHAT TYPE OF FILING METHOD?	F FILING DISBURSEMENT ESTIMATED TIME TO		WHAT COSTS DO YOU INCUR IN ADDITION TO TAX PREPARATION FEES?
PAPER RETURN  No Refund Processing Service	IRS direct deposit to your personal bank account.	Approximately 6 to 8 weeks 1	No additional cost.
Service	Check mailed by IRS to address on tax return(s).	Approximately 6 to 8 weeks 1	
ELECTRONIC FILING (E-FILE)	IRS direct deposit to your personal bank account.	Usually within 21 days 1	No additional cost.
No Refund Processing Service	Check mailed by IRS to address on tax return(s).	Approximately 21 to 28 days 1	
ELECTRONIC FILING (E-FILE)	Direct deposit to your personal bank account.	Usually within 21 days 1	\$40.002
Refund Processing Service			

Questions? Call 877-908-7228

<sup>1</sup>You may experience delays with your tax refund(s) if, for example, you enter incorrect bank account or contact information, you enter a bank account in someone else's name, or if possible suspicious activity is detected. If your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2023.

<sup>&</sup>lt;sup>2</sup>The charges here consist of an RPS Fee, a TurboTax fee and any fees for additional products and services purchased. See Section 3 of the Refund Processing Service Agreement for the cost of the service you have chosen.

#### We need your consent to process with this payment option

This is an IRS requirement

The purpose of this agreement is to confirm that you are eligible for this payment option. By agreeing, you allow Intuit, the maker of TurboTax software, to verify that your refund is enough to cover total fees and applicable sales tax.

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) at https://www.treasury.gov/tigta/.

To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

I authorize Intuit, the maker of TurboTax, to use the information provided in this 2022 return to determine whether a portion of the refund can be used to pay for tax preparation.

Nagarjuna Panamala First Name Last Name

Please type the date below: 04/17/2023

Date

Rajyalakshmi Panamala

04/17/2023

#### We need your OK to share your info with our partners

This is an IRS requirement

In order to finalize your request for this payment option, we need to send the following information to Green Dot Bank ('BANK') and to Santa Barbara Tax Products Group, LLC ('SBTPG'), the administrator and servicer of this payment option: your identifying information, your deposit information and your refund amount.

We transmit this information so that you may use this payment option. BANK and SBTPG will use your information in accordance with their applicable refund processing service agreement and privacy policy.

#### IRS regulations require the following statements:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) at https://www.treasury.gov/tigta/

I authorize Intuit, the maker of TurboTax, to disclose to BANK and SBTPG that portion of my 2022 tax return information that is necessary to enable BANK and SBTPG to process my refund.

I agree to the above statement.

Great! Now we just need your signature to confirm your decision.

First Name Last Name

Nagarjuna Panamala

Today's Date

04/17/2023

Spouse's First Name Spouse's Last Name

Rajyalakshmi Panamala

Today's Date

04/17/2023

sbia1301.SCR 12/21/22

2023

Capital Loss Carryforward Worksheet
Capital Loss Carryforward from 2022 to 2023
► Keep for your records

Name(s) Shown on Return	Social Security Number
Nagarjuna & Rajyalakshmi Panamala	880-41-8370

			T	
			Regular Tax	Alternative Minimum Tax
1	Enter the amount from 2022 Form 1040, line 15. If a loss,			
	enter as a negative amount	1	105,087.	130,987.
2	Enter the loss from 2022 Schedule D, line 21, as a positive			
	amount	2	3,000.	3,000.
3	Combine lines 1 and 2. If zero or less, enter -0	3	108,087.	133,987.
4	Enter the <b>smaller</b> of line 2 or line 3	4	3,000.	3,000.
	If line 7 of 2022 Schedule D is a loss, go to line 5;			
	otherwise, enter -0- on line 5 and go to line 9			
5	Enter the loss from 2022 Schedule D, line 7,			
	as a positive amount	5	58,554.	65,218.
6	Enter any gain from 2022 Schedule D, line 15. If a loss,			
	enter -0	6		0.
7	Add lines 4 and 6	7	3,000.	3,000.
8	Short-term capital loss carryforward to 2023.			
	Subtract line 7 from line 5. If zero or less, enter -0	8	55,554.	62,218.
	If line 15 of Schedule D is a loss, go to line 9;			
_	otherwise, skip lines 9 thru 13.			
9	Enter the loss from 2022 Schedule D, line 15, as a positive			
10	amount	9		
10	Enter any gain from 2022 Schedule D, line 7. If a loss, enter -0-	40		0
44		10 11	0.	0.
11 12	Subtract line 5 from line 4. If zero or less, enter -0	12	0.	0.
13		12		
13	Long-term capital loss carryforward to 2023.  Subtract line 12 from line 9. If zero or less, enter -0 ▶	13	0.	0.
	Subtract line 12 from line 9. If Zero of less, enter -0	13		

### Form 1099-B Worksheet

► Keep for your records

Acct Number		nancial ir	nstitution ►	ala Robi	nhood	Market	s In			Security No. 1–8370	
<u> </u>	r		•	1199	49402	Rep	orter'	s Tax ID	<b>&gt;</b> _		
Owner of accommodations			to IRS								
	Ar			re elig	ible to be	reported	d direct	tly on Sched	lule D,		
			bypassing i	Form 8	3949, ma <u>'</u>	y be sum		Proceeds		Cost Bas	is
Box A trans Box D trans (Do not dup	sactions	to repor	t directly o	n Sch	D, Line 8	Ba (long	term)		ahle hel	ow )	
(Bo <b>not</b> dup								Summary		Ow.)	
	Gains an recond	d losses i ciling the	by "8949 Bo transactions	ox <sup>"</sup> (i.e s in the	. the Box Quick E	to be che ntry Tabl	ecked e with	on Form 89. a brokerage	49) to a statem	ent.	
<b>8949 Box</b> Box A	<b>Proceed</b>	s	Cost Basis	3	Gain/(Lo	oss)	Adjus	stment Amt 1,281.18	Adj Ga	in/(Loss)	Code(s)
Short term									i	220.33	, · · · · · · · · · · · · · · · · · · ·
							<u> </u>		<u> </u>		
							I				
					I		1		1		
							<u> </u>		ļ		
Totals	27,	166.32	28,67	6.03	-1,	509.71		1,281.18		-228.53	
Note that a	these tota tax retur	als may c	ns/losses as	they i		ar on Fori comply	ท 894! with IF	s 9 and Sched RS rounding stment Amt	instruc	tions. (See s) Adj Gair	help) n/(Loss)
Form 8949	, Box .		27,16	8.00	28,	676.00		1,281.00	W	_	227.00
Form 8949 Form 8949	, Box	C C									
Sch D, Li	ne 8a										
Form 8949 Form 8949	, Box	E									
Form 8949,	, Box	F									
Total Federal State Backup	•		· ·						State II		
State Backap	VIIIIOIAII	ilg									
Total State Ba	ackup Wi	thholding								·	
Total Collectib Qualified Sma	ole Gain all Busine	ess (QSB	) gain (Sec	 1202)		 Total Ga	 iin	Exclude	 d Gain	Net Gair	1
Maximu Maximu	ım 60% e ım 75% e	exclusion exclusion	gain gain gain n gain		<b>&gt;</b>						
PDF Attachm Taxpayer mus If yes, you'll n transactions of	nent st mail in need to st	a statem	ent with mo	re deta	ails?						X No

### Form 1099-B Worksheet

► Keep for your records

		110	op ior your rooord				
Name(s) Shown Iagarjuna	on Return & Rajyalaksh	mi Panamala				Security No.	
Name of rep	orting financial in	nstitution ► Nati	onal Financi	al Services	LLC	14 25225	<del> </del>
Acct Number	er	► <u>x869</u>	20005 <b>Rep</b>	orter's Tax ID	<u>•</u>	14-352350	0 /
	count						
	A t	Form 8949 Repo	rting Exception 1	ransactions	-1I D		
	Any transa		iible to be reported 3949, may be sum		auie D,		
		bypassing Form 6	111 De Suit	Proceeds		Cost Basi	9
Box A tran	sactions to repor	t directly on Sch	D. Line 1a (short			COOL Buon	
	sactions to repor						
(Do <b>not</b> du	plicate any transac	tions summarized	above when maki	ng entries in the t	able bel	ow.)	
	Brokerag	e Statement (Fori	m 1099-B or subs	titute) Summary	Table		
	Gains and losses	by "8949 Box" (i.e	. the Box to be che	ecked on Form 89	149) to a	ssist in	
8949 Box	Proceeds	Cost Basis	Quick Entry Table	Adjustment Am	statem	ent.	Codo(o)
Box A			-17,794.21	0.00	1 Auj Ga	794.21	Coue(s)
	m sales with	cost basis	reported to	the TRS	<u> </u>	, 134.21	
DHOLC CCI	T Daich with	CODE DUBID					
	ļ.	<u> </u>	<u> </u>	<b>!</b>	ļ	!	
					•		
	T	T	T	T	1		
	1	I	I	I	1	1	
Totals	7,936.26	25.730.47	-17,794.21	0.00	DI _17	794.21	
		· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	Į.		•	
		Form 8949	and Schedule D	Totals			
			will appear on Fori				
	these totals may						
Location on		Proceeds	Cost Basis	Adjustment Am	t Code(	s) Adj Gain	/(Loss)
Sch D, Li	ne la	7,938.00	25,732.00			17	794.00
Form 8949 Form 8949	BOX B	7,930.00	23,732.00			-17,	794.00
Form 8949	D. Box C						
Sch D, Li							
Form 8949	, Box D						
Form 8949							
Form 8949	, Box F						
T	ID I MEIL II						
Total Federa	l Backup Withhold	ing			State II		
State Backur	Witholding				State II	,	
State Dackup	o williolanig						
Total State E	Backup Withholding	)				·	
_							<b>_</b>
Total Collect	ible Gain Iall Business (QSB	) asin (0== 1000)				INI~+ O =:	
Qualified SM	ıalı Business (QSB um 50% exclusion	gain (5ec 1202)	Total Ga	in Exclude	u Gain	Net Gain	
	um 60% exclusion						
	um 75% exclusion						
	um 100% exclusio						
			<u> </u>	<u> </u>		- 1	
PDF Attachi					_		
Taxpayer mu	ıst mail in a statem	ent with more deta	ails?			Yes	X No
	need to submit a c		B to the IRS to pro	vide documentati	on for sc	ome of the	
transactions	on your sales sum	mary.					

2022

Yes

Yes

Check here if this summarizes multiple sales. . . . >

No

No

No

Сору # <u>1</u>		Сар	Mai ASSE ► Keep		ur records	sneet			2022
Name(s) Shown on Jagarjuna &		nmi Paı	namala				Social Se		
Name of report Acct Number	ing financial	institutio	n►Robinh .►119949	nood 1 9402		Inc. as er's Tax ID .			
Owner of account Transactions we					<u> </u>				
	dditional sale sociated Capita	l Gain (L	ter for a sale .oss) Adjust	, doubĺ					
	ate Sold		Acquired		es Price oceeds)	Cost o Other Ba			llowed h Sale
Adjustment Amount	Ćod	e(s)	Holdir Perio	od to IRS?		Reported on Form 1099B?			
A	h of AAPL 03/ 03/18/22	18/2022 C					ПП		► No
Check to use		ППП							
2 2.00sh A	of AAPL 04/2 04/29/22		ALL \$165.00 04/28/22 IS	Check	here if this 299.98 Yes X		nultiple sa 0 • 0 0     Yes x		No
Check to use	worksheet (s	ee help)			100 K				
3 8.00sh	of AAPL 05/ 05/04/22	06/2022 C	ALL \$165.00 Various	Check	here if this	summarizes r	multiple sa	lles	<b>&gt;</b> 159.01
Check to use		ee help)	S S		Yes X	No No	Yes X		No
4 9.00sh	of AAPL 05/		ALL \$165.00 Various	Check	here if this	summarizes r	nultiple sa	iles	•
F <sup>-</sup>	55, 15, 22	1		L	V	<u> </u>		$\overline{}$	7

					Sale	(s) missing info?	لللك
			0-1- 0				
// 10040	Dan and address	0-1-	Sale Results		A -1!	0-1	
# 8949	Description	Sale	Cost	Adj.	Adjustment	Gain or	S/
Box	* * * * * * * * * * * * * * * * * * * *	Proceeds	Basis	Code(s)	Amount	(Loss)	L
	15.00sh of AAPL 03/18/2022 CALL \$165.00	29.96	225.00			-195.04	
	2.00sh of AAPL 04/29/2022 CALL \$165.00	299.98	600.00			-300.02	
	8.00sh of AAPL 05/06/2022 CALL \$165.00	605.96	809.01		159.01	-44.04	
	.00sh of AAPL 05/13/2022 CALL \$165.00	0.00	644.00			-644.00	
5A	2.00sh of AAPL 11/04/2022 PUT \$145.00	139.98	90.00			49.98	
	2.00sh of AMD 02/25/2022 CALL \$120.00	851.96	540.00			311.9	δS
7A	2.00sh of AMD 02/25/2022 CALL \$120.00	764.96	560.00			204.9	6 <b>S</b>
	8.00sh of AMD 02/25/2022 CALL \$120.00	784.94	1,110.02		325.08	0.0	
9 A	2.00sh of AMD 02/25/2022 CALL \$120.00	15.98	510.06			-494.08	3S
10A	5.00sh of AMD 05/13/2022 CALL \$100.00	979.94	855.01		20.01	144.9	
11A	2.00sh of AMEN 01/20/2023 CALL \$100.00	1,369.94	1,150.03	W	90.03	309.94	4S
12A	2.00sh of AMZN 03/18/2022 CALL \$3,500.00	5.98	185.00			-179.02	2S
13A	2.00sh of  AMRN 10/21/2022 CALL \$115.00	323.96	280.00			43.9	6S
14A	1.00sh of AMEN 10/28/2022 CALL \$120.00	359.98	230.00			129.98	3S
15A	8.00sh of BA 05/20/2022 CALL \$150.00	0.00	300.00			-300.00	0S
16A	2.00sh of BABA 02/11/2022 CALL \$120.00	839.96	440.00			399.90	6S
	2.00sh of BABA 02/11/2022 CALL \$125.00	699.98	400.00			299.98	
18A	1.00sh of COST 05/27/2022 CALL \$500.00	0.00	80.00			-80.00	0S
19A	1.00sh of CRM 04/29/2022 CALL \$180.00	159.98	150.00			9.98	3S
	See RQUICK						

Yes X

Yes

S

Check to use worksheet (see help)

Check to use worksheet (see help) ►

See TQUICK

Social Security No. 880-41-8370

	Brokerage	e Statement (Fori	m 1099-B or subs	titute) Summary	Table	
	Gains and losses	by "8949 Box" (i.e	. the Box to be che	ecked on Form 894	19) to assist in	
	reconciling the	transactions in the	Quick Entry Table	e with a brokerage	statement.	
8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	27,166.32	28,676.03	-1,509.71	1,281.18	-228.53	W
Short te	rm sales with	cost basis	reported to	the IRS		1
		T	ı	ı		1
		T	1	1		1
		Γ	1	1		T
		T				1
						<u>l</u>
Totals	27,166.32	28,676.03	-1,509.71	1,281.18	-228.53	
Totals	27,100.32	20,070.03	-1,303.71	1,201.10	-220.55	1
		Form 8949	and Schedule D	Totals		
	Totals gai			m 8949 and Sched	lule D.	
Note tha	nt these totals may o	•				help)
Location or	· · · · · · · · · · · · · · · · · · ·	Proceeds	Cost Basis	Adjustment Amt	,	
Sch D, L:	ine 1a			_		
Form 8949	9, Box A	27,168.00	28,676.00	1,281.00	W –	227.00
Form 8949	9, Box B					
Form 8949	9, Box C					
Sch D, L:	ine 8a					
Form 8949	9, Box D					
Form 8949	9, Box E					
Form 8949	9, Box F					
PDF Attach						1
Taxpayer m	ust mail in a statem	ent with more deta	ails?		Yes X	No

**Copy** # <u>1</u>

## Capital Asset Sales Worksheet ► Keep for your records

Name(s) Shown on Return Nagarjuna & Rajyalakshmi

Social Security No. 880-41-8370

agar Jui	ia « Ka	jyaraksi	IIIII Pali	lalliala					_   880-	-41-8	370	
Name of Acct Nur	Name of reporting financial institution ► National Financial Services LLC  Acct Number											
Owner of	account											
	Owner of account											
16	h d - l : 4		:f. 44			/ Table	<b>4</b> :	مئامات	46 - 4-61		.: <b>7</b>	4-
II you	nave auun he associa	ioriai saie i ted <b>Canita</b>	າກວ ເວ <i>e</i> ກເ I Gain (I ເ	er for a sale oss) Adjust	, aoub ments	Workshee	any n t <i>(See</i>	eiu III e field	เทษ เสมเย heln for เ	nore a	iickzooi letails )	111 10
Sale#		Property D					(000				Ctaner,	
8949	Date	Sold	Date A	Acquired		es Price		Cost			isallowe	
Box	atma ant	Adjust	mont	Holdir		oceeds) Basis		ther E	Basis		Vash Sa	
	stment	Code		Perio			Repo	ried			rted on 1099B?	
				or use by St	-	Step and Im	port o	nly (Se	ee help)			
1 A		LTD ILS( 1/03/22		2/12/21		here if this				sales		
A	0.	1/03/22	_	S S		Yes X		<u>3,3</u>	00.00 Yes	S X	U ∐No	.00
Check 1	to use wor	ksheet (se		<u> </u>	<u> </u>	.00 11	<u>'</u>	ŤΤ	<del>                                      </del>		1 11	
		0.00								ШШ	X	
ЩЩ							Ш	Щ		Щ	ШШ	
2 A		LTD ILS( 1/03/22		2/22/21	Check	here if this		narizes	60.00	sales		.00
Δ.	0.1	1/03/22		S		Yes X		40 1, 2	Yes	S X	No	
Check	o use wor	ksheet (se		<u> </u>	)	. 00 11	<u>'</u>	ŤΤ	<del>                                      </del>			
		0.00									X	
ШЩ					ЩЩ		Ш	Щ		Щ	ЩЩ	$\Box$
3 A		LTD ILS( 1/03/22		2/24/21	Check	here if this 752 • 63			62.50	sales		•00
<u> </u>	0.	1/03/22		S		Yes X		10 T	Yes	S X	No	
Check 1	to use wor	ksheet (se	ee help)	<b>▶</b>	)							
		0.00									X	
	DAT ANDTO	TECHNOLO	CTEC TW	C CL A 20	Chook	horo if this	Oumn	00170	n multiple		ЩЩ	
A		124/22		2/08/21	CHECK	237.54			49.80	Sales		.00
-		, ,		S		Yes X		No .	Yes	X	No	
Check 1	to use wor	ksheet (se	ee help)	<b>•</b>	)							
		0.00								$\sqcup$	X	$\sqcup \sqcup$
	See TOU	ITCV	шш		Chook	here if this	Cumn	00170	n multiple			$\Box$
	see IQU	JICK			CHECK		Sullill	ilalize:	s munipi	s Sales		
						Yes		No	Yes	3	No	)
Check	to use wor	ksheet (se	ee help)	<b>•</b>					لبلبا			
<del>                                      </del>		<del></del>			<del></del>	<del></del>			<del>                                     </del>	+++		+++
		шШШ						Ш	Sale(s	) missi	 ina info?	للللإ
									- Cu.U(0	,		

				Sale Results	S			
#	8949	Description	Sale	Cost	Adj.	Adjustment	Gain or	S/
	Box		Proceeds	Basis	Code(s)	Amount	(Loss)	L
	Α	JFROG LTD ILS0.01 50		3,300.00			-1,794.73	
2		JFROG LTD ILS0.01 25		1,560.00			-807.37	
		JFROG LTD ILS0.01 25	752.63	1,462.50			-709.87	
		PALANTIR TECHNOLOGIES INC CL A 20	237.54	749.80			-512.26	
5	A	PALANTIR TECHNOLOGIES INC CL A 30	356.30	1,413.01			-1,056.71	S
6	Α	PALANTIR TECHNOLOGIES INC CL A 30	356.30	1,475.37			-1,119.07	
		PALANTIR TECHNOLOGIES INC CL A 50	593.84	1,975.01			-1,381.17	7S
		SORRENTO THERAPEUTICS INC COMUSD 200	614.03	2,990.00			-2,375.97	7S
9	Α	PALANTIR TECHNOLOGIES INC CL A 20	237.54	964.78			-727.24	lS
10	A	FUBOTV INC COM 75	679.87	3,150.00			-2,470.13	
11	Α	SORRENTO THERAPEUTICS INC COMUSD 100	307.01	1,147.00			-839.99	S
12		C3 AI INC CL A 10	228.24	1,035.00			-806.76	S
13	A	PUELCELL ENERGY INC COM 100	351.99	1,850.00			-1,498.01	S
14	A	FUBOTV INC COM 25	226.62	787.50			-560.88	3S
15	A	PALANTIR TECHNOLOGIES INC CL A 30	356.31	775.50			-419.19	S
16	A	FUBOTV INC COM 25	226.63	600.00			-373.37	7S
17	A	SORRENTO THERAPEUTICS INC COMUSD 50	153.51	495.00		•	-341.49	S

Social Security No. 880-41-8370

	Brokerag	e Statement (Fori	m 1000-R or subs	titute) Summary	Tahle	
	-	by "8949 Box" (i.e				in
		transactions in the			•	
8949 Box	Proceeds	Cost Basis		Adjustment Amt		oss) Code(s
Box A	7,936.26	25,730.47			-17,794	
Short te	rm sales with					
		1	1	1		
	1	T	T	T	1	T
	_	T	T	T	1	
Totals	7,936.26	25,730.47	-17,794.21	0.00	-17,794	1.21
	<b>-</b>		and Schedule D			
N - 4 - 4	•	ns/losses as they				(0 11-)
	t these totals may o					
Location or		Proceeds	Cost Basis	Adjustment Amt	Code(s) Ad	Gain/(Loss)
Sch D, L: Form 8949		7,938.00	25,732.00			17 704 00
Form 8949		7,930.00	25,732.00		-	-17 <b>,</b> 794 <b>.</b> 00
Form 8949						
Sch D, L:						
Form 8949						
Form 8949						
Form 8949						
LOIM OJI.	5, 20A 1	I	I	I	<u> </u>	
PDF Attach	ment					
	ust mail in a statem	ent with more deta	ails?		Yes	X No

# Tax Payments Worksheet ► Keep for your records

Name(s) Shown on Return	Social Security Number
Nagarjuna & Rajyalakshmi Panamala	880-41-8370

LStil		deral	2022 (11	111016	State	Herits IO	any state	5 01 100	Local	. 1 101	ι <b>Ρ</b> )
	Date	Amount	Dat	е	Amount	ID	Dat	ie .	Amount	II	
2 <u>0</u> 3 <u>0</u>	04/18/22 06/15/22 09/15/22 01/17/23		04/18 06/19 09/19 01/17	5/22			04/13 06/13 09/13 01/13	5/22			
_	Estimated nents									- <u> </u>	
		Other Than With s, see Tax Help)	holding	ı	Federal	s	tate	ID	Local	-	ID
7 8	Credited by Credit	nts applied to 202 estates and trust es 1 through 7 ions	s 								
Taxe	es Withhel	d From:				Federal		State	L	ocal	
10 11 12 13 14 15 16 17 18 a b c d e f	Forms W-2 Forms 109 Forms 109 Schedules Forms 109 Social Secient 1099 Other with the Other with the Positive Ac Additional I	9-R	EC, 1099-I	Loc Loc Loc Loc Loc	9-G	14,0			500.		
20	Total Tax	Payments for 20	)22			14,0			500.		
		es Paid In 202 or localities, see		)		S	tate	ID	Local		ID
21 22 23 24	2021 estim Balance du	ith 2021 extension ated tax paid afto ue paid with 2021 anded returns, ins	er 12/31/20 return	021							

Keep for your records

				Reep for your	records			
	ame(s) Show agarjuna		kshmi Panama	ala			ecurity Number	
2	021 State a	nd Local Inco	me Tax Informati	on				
	(a) State or	(b) Paid With	(c) Estimates Pd	(d) Total With-	(e) Paid With	(f) Total Over-	(g) Applied	

	State or Local ID	Paid With Extension	Estimates Pd After 12/31	Total With- held/Pmts	Paid With Return	Total Over- payment	Applied Amount
	GA			3,239.		172.	
То	tals			3,239.		172.	

2021 State Extension Inform	nati∧n

(a) State	(b) Paid With Extension

#### 2021 Locality Extension Information

(a)	(b)
Locality	Paid With Extension

#### 2021 State Estimates Information

(a)	(c)
State	Estimates Paid After 12/31

#### 2021 Locality Estimates Information

(a) Locality	(c) Estimates Paid After 12/31

#### **2021 State Taxes Due Information**

(a) State	(e) Paid With Return

#### **2021 Locality Taxes Due Information**

(a) Locality	(e) Paid With Return

#### 2021 State Refund Applied Information

(a) State	(g) Applied Amount

#### 2021 Locality Refund Applied Information

(a)	(g)
Locality	Applied Amount

#### 2021 State Tax Refund Information

(a)	(d) Total	(f) Total	
State	Withheld/Pmts	Overpayment	
GA	3,239.	172.	

#### 2021 Locality Tax Refund Information

(a)	(d) Total	(f) Total
Locality	Withheld/Pmts	Overpayment

			Τ
Other Tax and Income Information		2021	2022
1 Filing status	1 2 3 4 5 6 7 8	2 MFJ 15,026. 86,190. 3,671.	2 MFJ 19,901. 130,987. 11,853.
QuickZoom to the IRA Information Worksheet for IRA information	١		►
Excess Contributions		2021	2022
<ul> <li>9 a Taxpayer's excess Archer MSA contributions as of 12/31</li> <li>b Spouse's excess Archer MSA contributions as of 12/31</li> <li>10 a Taxpayer's excess Coverdell ESA contributions as of 12/31</li> <li>b Spouse's excess Coverdell ESA contributions as of 12/31</li> <li>11 a Taxpayer's excess HSA contributions as of 12/31</li> <li>b Spouse's excess HSA contributions as of 12/31</li> </ul>	9 a b 10 a b 11 a b		
Loss and Expense Carryovers Note: Enter all entries as a positive amount		2021	2022
12 a Short-term capital loss          b AMT Short-term capital loss          13 a Long-term capital loss          b AMT Long-term capital loss          14 a Net operating loss available to carry forward          b AMT Net operating loss available to carry forward          15 a Investment interest expense disallowed          b AMT Investment interest expense disallowed          16 Nonrecaptured net Section 1231 losses from:       a 2022         b 2021          c 2020          d 2019          e 2018          f 2017          e 2018          f 2017	12 ab 13 ab 14 ab 15 ab 16 ab cd ef 17 ab cd ef	40,533. 47,197. 0. 0.	55,554. 62,218.
Credit Carryovers		2021	2022
18       General business credit	18 19a b c d e f		
b 2021	20 a b c d 21 22 23		

880-41-8370

Oth	er Carryovers				2021	2022
24 25 Cha	Section 179 ex Excess foreign housing deduction:	a b c d	Taxpa Taxpa Spous Spous	ction disallowed		
26	2021 Carryove	er of		Other Property	Capital Gain	Cash

#### contributions from: (a) 50% **(b)** 30% (c) 30% (d) 20% (e) 60% a 2021 . . . . . . . . . . . . **b** 2020 . . . . . . . . . . . **c** 2019 . . . . . . . . . . . **d** 2018 . . . . . . . . . . . . **e** 2017 . . . . . . . . . . . 27 2022 Carryover of **Other Property Capital Gain** Cash charitable (e) 60% contributions from: (a) 50% **(b)** 30% (c) 30% (d) 20% a 2022 ...... **b** 2021 . . . . . . . . . . . **c** 2020 . . . . . . . . . . . **d** 2019 . . . . . . . . . . . . **e** 2018 . . . . . . . . . . . .

28	Amount overpaid less earned income credit	4,225.
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Qualified Business Income Deduction (Section 199A) carryovers						2021	2022
29 30	Qualified business loss ca Qualified PTP loss carryfo	rward					
31	Applicable percentage	2018 2019 2020 2021		100	0.00		

#### 2021 State Capital Loss Carryovers (For users not transferring from the prior year)

State ID	Short-term Capital Loss for State	AMT Short-term Capital Loss for State	Long-term Capital Loss for State	AMT Long-term Capital Loss for State	Capital Loss (combined) for State	AMT Capital Loss (combined) for State

## Santa Barbara Tax Products Group, LLC, a division of Green Dot Corporation, a Delaware corporation, and Green Dot Bank Refund Processing Service Agreement ("Agreement")

Name: Nagarjuna & Rajyalakshmi Panamala

Social Security No.: 880-41-8370

This Agreement contains important terms, conditions and disclosures about the processing of your refund(s) (the "Refund Processing Service" or "RPS") by Santa Barbara Tax Products Group, LLC, a division of Green Dot Corporation, a Delaware corporation, ("Processor"), a third party processor using banking services of Green Dot Bank ("Bank"). Read this Agreement carefully before accepting its terms and conditions, and print a copy and/or retain this information electronically for future reference. As used in this Agreement, the words "you" and "your" refer to the applicant or both the applicant and joint applicant if the 2022 federal income tax return(s) is a joint return (individually and collectively, "Applicant"). The words "we," "us" and "our" refer to Bank and Processor.

#### 1. NOTICE: No Requirement To Use the Refund <u>Processing Service In Order To File Electronically.</u>

YOU UNDERSTAND THAT A REFUND PROCESSING FEE OF \$40.00 ("REFUND PROCESSING FEE") IS CHARGED BY PROCESSOR TO ESTABLISH A TEMPORARY ACCOUNT TO RECEIVE YOUR FEDERAL TAX REFUND(S), TO PROCESS IT, TO DEDUCT YOUR TURBOTAX FEES, AND OTHER AUTHORIZED FEES FROM THAT ACCOUNT, AND TO FORWARD FUNDS TO YOU. THE REFUND PROCESSING FEE IS NOT A LOAN; IT IS DUE TO PROCESSOR WHETHER OR NOT THE FEDERAL TAX REFUND(S) OCCURS BUT PROCESSOR WILL NOT PURSUE COLLECTION OF THE REFUND PROCESSING FEE IF YOUR FEDERAL TAX REFUND(S) DOES NOT OCCUR. THIS FEE IS COLLECTED ONLY AT THE TIME THE REFUND(S) OCCURS, YOU CAN AVOID THIS FEE AND NOT USE THE REFUND PROCESSING SERVICE BY INSTEAD PAYING THE APPLICABLE TURBOTAX FEES TO INTUIT INC. BY CREDIT OR DEBIT CARD AT THE TIME YOU FILE YOUR 2022 FEDERAL INCOME TAX RETURN(S) AND ELECTING TO HAVE YOUR REFUND(S) DIRECTLY DEPOSITED IN YOUR OWN BANK ACCOUNT OR MAILED TO YOU. IF YOU DO USE THE REFUND PROCESSING SERVICE, YOU CAN EXPECT TO RECEIVE THE PROCEEDS FROM YOUR FEDERAL TAX REFUND(S) WITHIN 21 DAYS FROM WHEN THE INTERNAL REVENUE SERVICE ("IRS") ACCEPTS YOUR RETURN(S) UNLESS THERE ARE PROCESSING DELAYS (OR UNLESS YOUR RETURN(S) CONTAINS EARNED INCOME TAX CREDIT OR ADDITIONAL CHILD TAX CREDIT, IN WHICH CASE THE IRS WILL ISSUE YOUR REFUND(S) NO EARLIER THAN FEBRUARY 15, 2023). THE REFUND PROCESSING SERVICE WILL NEITHER SPEED UP NOR DELAY YOUR FEDERAL TAX REFUND(S). THE COST OF PREPARING YOUR TAX RETURN(S) IS NOT ANY MORE OR LESS IF YOU PURCHASE THE REFUND PROCESSING SERVICE.

2. <u>Authorization to Release Personal Information.</u> You authorize the IRS to disclose any information to Bank and Processor related to the funding of your 2022 federal tax refund(s). You also authorize Intuit Inc., as the transmitter of your electronically filed tax return(s), Bank and Processor to disclose to each other certain information about you and your tax return(s) for the purpose of providing the services contemplated under this Agreement. You also represent that any authorizations you have made in this Section 2 have also been obtained from and are made with respect to your spouse, if this is a jointly filed return. Please see the Privacy Policy at the end of this Agreement describing how Bank may use or share your personal information.

3. Summary of Terms

Expected Federal Refund	2,214.00
Less Processor Refund Processing Fee	40.00
Less TurboTax Fees	25.00
Less Fees for Additional Products and Services Purchased \$	-10.00
Expected Proceeds*	2,159.00

<sup>\*</sup> These amounts are itemized. This is only an estimate. The amount will be reduced by any applicable sales taxes, and if applicable, a Return Item Fee and an Account Research and Processing Fee paid to Processor as set forth in Sections 4, 6 and 7 below.

4. <u>Temporary Deposit Account Authorization.</u> You hereby authorize Bank to establish a temporary deposit account ("Deposit Account") for the purpose of receiving your tax year 2022 federal tax refund(s) from the IRS. Bank or Processor must receive an acknowledgement from the IRS that your return(s) has been electronically filed and accepted for processing before the Deposit Account can be opened. You authorize Processor to deduct from your Deposit Account the following amounts: (i) the Refund Processing Fee; (ii) the fees and charges related to the preparation, processing and transmission of your tax return(s) ("TurboTax Fees"); and (iii) fees for Additional Products and Services Purchased, plus applicable taxes. You also authorize Processor

DIDECT DEDOCIT ACCOUNT TYPE

to deduct thirty dollars (\$30.00) as a returned item processing fee (the "Return Item Fee") from your Deposit Account for the additional processing required in the event that your deposit is returned or cannot be delivered as directed in Section 7 below. A fee of \$30.00 (the "Account Research and Processing Fee") may be charged if we are required to provide additional processing to return the funds to the IRS. These fees will be deducted from the Deposit Account and will be retained by Processor. You authorize Processor to disburse the balance of the Deposit Account to you after making all authorized deductions or payments. If the Deposit Account does not have sufficient funds at the time your tax refund is processed to pay the TurboTax Fees and the fees for Additional Products and Services Purchased as set forth in Section 3, and any sales tax (collectively, "Fees"), or if your refund proceeds are delayed (a) you authorize Processor to automatically deduct such fees (or any portion thereof) via ACH, electronic check, or wire transfer directly from the account into which you authorized Processor to deposit your expected tax refund proceeds as set forth in Section 7, and (b) if you made alternative arrangements with TurboTax for payment of such fees, those arrangements will be attempted prior to any automatic deduction. You also authorize any amounts outstanding pursuant to this paragraph to be deducted from refunds you may receive up to 24 months after the date of this Agreement and processed through Processor. Additionally, if the Fees are not fully repaid from the Deposit account for any other reason not specified above, (a) you authorize Processor to automatically deduct such Fees (or any portion thereof) or attempt to deduct such Fees for up to 4 months after your tax return was accepted via ACH, electronic check, or wire transfer directly from the account into which you authorized Processor to deposit your expected tax refund proceeds as set forth in Section 7, and (b) if you made alternative arrangements with TurboTax for payment of such Fees, those arrangements will be attempted prior to any automatic deduction. To make alternative payment arrangements or revoke your consent to automatic deduction, you must contact Intuit Inc. according to the instructions on the notices e-mailed to you by Intuit Inc. regarding outstanding amounts owed under this Agreement.

- 5. Acknowledgements. (a) You understand that: (i) neither Bank nor Processor can guarantee the amount of your tax year 2022 federal tax refund(s) or the date it will be issued, and (ii) neither Bank nor Processor is affiliated with the transmitter of the tax return(s) (Intuit Inc.) and neither warrants the accuracy of the software used to prepare the tax return(s). (b) You agree that Intuit Inc. is not acting as your agent and is not under any fiduciary duty with respect to the processing of your refund(s) by Bank and Processor. (c) Your refund(s) may be held or returned to the IRS if it is suspected of fraud or identity theft.
- 6. Truth in Savings Disclosure. The Deposit Account is being opened for the purpose of receiving your (or both spouses if this is a jointly filed return) tax year 2022 federal tax refund(s). Processor and Bank will deduct from the Deposit Account the amounts set forth in Section 3, including the \$40.00 Refund Processing Fee for opening and maintaining the Deposit Account and processing your tax refund(s). No other deposits may be made to the Deposit Account. No withdrawals will be allowed from the Deposit Account except to collect the amounts stated in this Section, Section 3, Section 7, and Section 4. No interest is payable on the deposit; thus, the annual percentage yield and interest rate are 0%. The Deposit Account will be closed after all authorized deductions have been made and any remaining balance has been disbursed to you. We will also charge a Return Item Fee of \$30.00 if the refund(s) cannot be delivered as directed in Section 7 of this Agreement. A \$30.00 Account Research and Processing Fee may be charged if we are required to provide additional processing to return the funds to the IRS. These fees will be deducted from the Deposit Account and will be retained by Processor. Questions or concerns about the Deposit Account should be directed to Santa Barbara Tax Products Group, LLC, PO Box 817, West Chester, OH 45071 or via the Internet at http://sbtpg.com.
- 7. Disbursement Method: You agree that the disbursement method selected below will be used by Processor to disburse funds to you.

By using the Direct Deposit method of disbursement, the balance of your Deposit Account will be disbursed to you electronically by ACH direct deposit to your personal bank account designated below. If a joint return is filed, the bank account may be a joint account or the individual account of either spouse.

DINECT DEPOSIT ACCOUNT TIPE.				
X Checking Savings				
Savings				
RTN #	322271627			
Account #	720771810			

Page 3

institution to confirm that you are using the correct RTN (routing) and account number. If you or your representative enter your account information incorrectly and your deposit is returned to Bank, the Deposit Account balance minus a \$30.00 Return Item Fee will be disbursed to you via a cashier's check mailed to your physical address of record. Bank, Processor and Intuit Inc. are not responsible for the misapplication of a direct deposit that results from error, negligence or malfeasance on the part of you or your representative. In cases where Bank has received your federal tax refund(s) but is unable to deliver the funds directly to you, funds may be held at Bank until claimed, or returned to the IRS. An Account Research and Processing Fee of \$30.00 may be charged if we are required to provide additional processing to return the funds to the IRS. Return Item and Account Research and Processing Fees will not exceed \$60.00 in the aggregate, and will be deducted from the Deposit Account for federal refunds that continue to be undeliverable and unclaimed and must be returned to the IRS. These fees will be retained by Processor. Due to the risk of fraudulent diversion of tax refunds, we will not process any address or account changes for purposes of disbursing your tax refund(s). If we become aware that your address or checking or savings account has changed after you sign this Agreement but before your federal tax refund(s) is received by us, upon receipt of your federal tax refund(s) from the IRS we will return your tax refund(s) to the IRS after deducting our Refund Processing Fee, TurboTax Fees and other applicable fees. We will do our best to escalate the return of your federal tax refunds to the IRS and you will need to work with the IRS directly for disbursement.

8. FEDERAL ELECTRONIC FUND TRANSFER ACT DISCLOSURES: In case of errors or questions about electronic transfers to or from the Deposit Account, write to Santa Barbara Tax Products Group, LLC, PO Box 817, West Chester, OH 45071 or telephone (877) 908-7228 and provide your name, a description or explanation of the error, and the dollar amount of the suspected error. We will determine whether an error occurred within 10 business days after we hear from you and will correct any error promptly. If we need more time, however, we may take up to 45 business days to investigate your complaint or question. If we decide to do this, we will credit your Deposit Account within 10 business days for the amount you think is in error, although in most circumstances you won't have use of the money until we complete our investigation. If we ask you to put your complaint or question in writing and we do not receive it within 10 business days, we may not credit your Deposit Account. For errors involving transfers of funds to or from the Deposit Account within 30 business days after the first deposit to the Deposit Account was made, (i) we may take up to 90 business days to investigate your complaint or question, and (ii) we may take up to 20 business days to credit your Deposit Account for the amount you think is in error. We will tell you the results within three business days after completing our investigation. If we decide that there was no error, we will send you a written explanation. You may ask for copies of the documents that we used in our investigation.

Business Days: Our business days are Monday through Friday, excluding federal holidays. Saturday, Sunday, and federal holidays are not considered business days, even if we are open.

Confidentiality: We will disclose information to third parties about your account or the transfers you make:

- To complete transfers as necessary;
- To verify the existence and condition of your account upon the request of a third party, such as a credit bureau or merchant;
- To comply with government agency or court orders:
- If you give us your written permission; or
- As explained in the Privacy Policy following this Agreement.

Our Liability: If we do not complete a transfer to your account on time or in the correct amount according to this Agreement, we may be liable for your losses or damages. In addition to all other limitations of liability set forth in this Agreement, we will not be liable to you if, among other things:

- Circumstances beyond our control (such as fire, flood, water damage, power failure, strike, labor dispute, pandemic, computer breakdown, telephone line disruption, or a natural disaster) prevent the transfer, despite reasonable precautions that have been taken.
- The funds in your account are subject to legal process or other claim restricting such transfer.
- You, your representative or a third party provide us with inaccurate or untimely information.
- 9. Compensation. In addition to any fees paid directly by you to Intuit Inc., Processor will pay

compensation to Intuit Inc. in consideration of Intuit Inc.'s provision of various programming, testing, data processing, transmission, systems maintenance, status reporting and other software, technical and communications services. The Refund Processing Fee will be retained by Processor for its Refund Processing Service. Processor shall pay Bank for its banking services.

- 10. Governing Law. The enforcement and interpretation of this Agreement and the transactions contemplated herein shall be governed by the laws of the United States, including the Electronic Signatures in Global and National Commerce Act, and, to the extent state law applies, the substantive laws of Ohio.
- 11. Arbitration Provision. You acknowledge that the services set forth in this Agreement are being made available and priced by Processor on the basis of your acceptance of the following arbitration provision ("Arbitration Provision"). By entering into this Agreement, you acknowledge that you are giving up the right to litigate Claims (as defined below) if you, Bank or Processor elects arbitration of the Claims pursuant to this provision, except as otherwise expressly provided herein, and you hereby knowingly and voluntarily waive the right to trial of all Claims subject to this Agreement. You further acknowledge that you have read this Arbitration Provision carefully, agree to its terms, and are entering into this Agreement voluntarily and not in reliance on any promises or representations whatsoever except those contained in this Agreement.

#### ARBITRATION NOTICE

THIS AGREEMENT CONTAINS AN ARBITRATION PROVISION. PLEASE READ THIS PROVISION CAREFULLY, AS IT AFFECTS YOUR LEGAL RIGHTS.

- 11.1. Arbitration of Claims: Except as expressly provided herein, any claim, dispute or controversy (whether based upon contract; tort, intentional or otherwise; constitution; statute; common law; or equity and whether pre-existing, present or future), including initial claims, counter-claims, cross-claims and third-party claims, arising from or relating directly or indirectly to this Agreement, including the validity, enforceability, interpretation, scope, or application of the Agreement and this Arbitration Provision (except for the prohibition on class or other non-individual claims, which shall be for a court to decide) ("Claim") shall be decided, upon the election of you, Bank or Processor (or our agents, employees, successors, representatives, affiliated companies, or assigns), by binding arbitration before the American Arbitration Association ("AAA"). Arbitration replaces the right to litigate a claim in court or to have a jury trial. The AAA's phone number is 800-778-7879 and website is http://www.adr.org. You may obtain copies of the current rules, forms, and instructions for initiating an arbitration using the above information.
- 11.2. Other Claims Subject to Arbitration: In addition to Claims brought by you, Claims made by anyone connected with you or anyone making a Claim through you (including a taxpayer filing jointly, employee, agent, representative, affiliated company, predecessor or successor, heir, assignee, or trustee in bankruptcy) against us shall be subject to arbitration as described herein.
- 11.3. Exceptions: We agree not to invoke our right to arbitrate any individual Claim you bring in small claims court or an equivalent court so long as the Claim is pending only in that court. This Arbitration Provision also does not limit or constrain our right to interplead funds in the event of claims to the Account by several parties.
- 11.4. Individual Claims Only: Claims may be submitted to arbitration on an individual basis only. Claims subject to this Arbitration Provision may not be joined or consolidated in arbitration with any Claim of any other person or be arbitrated on a class basis, in a representative capacity on behalf of the general public or on behalf of any other person, unless otherwise agreed to by the parties in writing. However, taxpayers filing jointly and party to this Agreement are considered as one person; Processor and its officers, directors, employees, agents, and affiliates are considered as one person; and Bank and its officers, directors, employees, agents, and affiliates are considered as one person.
- 11.5. Arbitration Fees: If you initiate arbitration, we will advance any arbitration fees, including any required deposit. If we initiate or elect arbitration, we will pay the entire amount of the arbitration fees, including any required deposit. We will also be responsible for payment and/or reimbursement of any arbitration fees to the extent that such fees exceed the amount of the filing fees you would have incurred if your Claim had been brought in the state or federal court nearest your residence with jurisdiction over the Claims.
- 11.6. Procedure: A single arbitrator will resolve the Claims. The arbitrator will be a lawyer with at least ten years' experience or who is a former or retired judge. The arbitration shall follow the rules and procedures of the arbitration administrator in effect on the date the arbitration is filed, except when there is a conflict or inconsistency between the rules and procedures of the arbitration administrator and this Arbitration Provision, in which case this Arbitration Provision shall govern. Any in-person arbitration hearing for a Claim

shall take place within the federal judicial district in which you live or at such other reasonably convenient location as agreed by the parties. The arbitrator shall apply applicable substantive law consistent with the Federal Arbitration Act, 9 U.S.C. § 1 et seq. (the "FAA") and shall honor all claims of privilege and confidentiality recognized at law. All statutes of limitations that would otherwise be applicable shall apply to any arbitration proceeding. The arbitrator shall be empowered to grant whatever relief would be available in court under law or in equity. Any appropriate court may enter judgment upon the arbitrator's award. This Arbitration Provision is made pursuant to a transaction involving interstate commerce, and shall be governed by the FAA.

12. Taxpayer Identity Validation Disclosure. To help Bank, Processor and the government identify and fight tax refund fraud, as well as fight the funding of terrorism and money laundering activities, Bank and Processor obtain, verify, and record information that identifies each Refund Processing Service taxpayer. What this means for you: When you apply to use the Refund Processing Service for the purpose of receiving your federal tax refund(s), we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents if we need to perform additional due diligence on your account.

#### YOUR AGREEMENT

Bank and Processor agree to all of the terms of this Agreement. By selecting the "I Agree" button in TurboTax: (i) You authorize Bank to receive your 2022 federal tax refund(s) from the IRS and Processor to make the deductions from your refund(s) described in the Agreement, (ii) You agree to receive all communications electronically in accordance with the "Communications" section of the Tax Year 2022 TurboTax(Registered Trademark) User Agreement, (iii) You consent to the release of your 2022 federal tax refund(s) deposit information and application information as described in Section 2 of this Agreement; (iv) You consent to the automatic debiting of your personal bank account as set forth in Section 4, as applicable, and the Arbitration Provision in Section 11; and (v) You acknowledge that you have reviewed, and agree to be bound by, the Agreement's terms and conditions. If this is a joint return, selecting "I Agree" indicates that both spouses agree to be bound by the terms and conditions of the Agreement.

Rev. 11/2021

FACTS	WHAT DOES GREEN DOT BANK	DO WITH YOUR PERSONAL INFO	ORMATION?
Why?	Financial companies choose how the consumers the right to limit some bur we collect, share, and protect your punderstand what we do	t not all sharing. Federal law also red	quires us to tell you how
What?	The types of personal information we have with us. This information can in  Social Security number and account account transactions and checkin transaction history and payment have when you are no longer our custome notice.	clude: unt balances g account information nistory	
How?	All financial companies need to share business. In the section below, we lis customers' personal information; the can limit this sharing.	st the reasons financial companies c	an share their
F	Reasons we can share your personal information	Does Green Dot Bank share?	Can you limit this sharing?
such as to maintain ye	veryday business purposes — process your transactions, our account(s), respond to court d legal investigations, or report to eaus.	Yes	No
	arketing purposes — r products and services to you.	Yes	No
	narketing with other companies.	Yes	No
business	filiates' everyday purposes — n about your transactions ences.	Yes	No
business	filiates' everyday purposes — n about your creditworthiness.	No	We don't share
For our af	filiates to market to you.	No	We don't share
For nonaf	filiates to market to you.	No	We don't share

Questions? Call Toll Free: 800-901-6663

#### Page 2

What we do	
How does Green Dot Bank protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Green Dot Bank collect my personal information?	We collect your personal information, for example, when you     open an account or make deposits or withdrawals from your account     tell us where to send the money or provide account information     give us your contact information  We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only     sharing for affiliates' everyday business purposes — information about your creditworthiness     affiliates from using your information to market to you     sharing for nonaffiliates to market to you  State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.  Our affiliates include companies with a common corporate identity of Green Dot (such as our parent bank holding company Green Dot Corporation) and tax processing services companies, such as Santa Barbara Tax Products Group, LLC.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.  • Green Dot Bank does not share with nonaffiliates so they can market to you.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.  The only joint marketing partners we share with are Intuit Inc. and its affiliates and subsidiaries.

### **Additional Information From 2022 Federal Tax Return**

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36 A Check 1 37 A Check 1 38 A Check 1	6.00sh of 03 to use wor  1.00sh of 11 to use wor  3.00sh of 01 to use wor	RBLX 03/ /16/22  ksheet (set   Set   Set	18/2022 C  ee help)  20/2023 C  1  ee help)  07/2022 C  0  ee help)  20/2023 C	Various S ALL \$35.00 1/09/22 S ALL \$50.00 1/03/22 S ALL \$40.00 Various	Check he	es X  rere if thi  349.9  es X  rere if thi  8.9  fes X  rere if thi  5.9	8 S S S S S S S S S S S S S S S S S S S	No N	610 	Yes  Ves  Ultiple  00  Yes  Ves  Ultiple  00  Ves  Ultiple  00  Ves	X Sale X X Sale	es		No No No No	

40	19.00sh of SNA	AP 03/11/2022	CALL \$40.00	Check here	if this	summarizes	multiple	sales	s <b>▶</b>
A	03/10	/22	Various	3	7.95	8	45.00		
			S	Yes	Х	No	Yes	Х	No
Check t	to use workshe	et (see help)	) ►						
									<u> </u>
ЦЦЦ		$oldsymbol{oldsymbol{\sqcup}} oldsymbol{\sqcup} oldsymbol{\sqcup} oldsymbol{\sqcup} oldsymbol{\sqcup}$		<u>,                                      </u>				ШШ	
41			CALL \$50.00					sales	; ▶
A	01/12	/22	01/04/22		9.98		50.00		
			S	Yes	X	No	Yes	X	No
Check t	to use workshe	et (see help)	) <b>-</b>				$\perp$		
<del>                                     </del>	<del></del>		<del></del>						<del>                                     </del>
								$\sqcup \sqcup$	
			CALL \$50.00					sales	
A	02/04	/ 2 2	Various	1	4.94		38.02	37	317.02
Chack	te use werkebe	at (aga bala)	S	Yes	Χ	No	Yes	X	No
Check	to use workshe	et (see neip)						H	<del>                                     </del>
<del>                                     </del>	<del></del>	11111111	<del>                                      </del>			111111	<del>-   -   -  </del>	HH	<del>                                     </del>
13 13	3.00sh of SNA	→	CALL \$30.00	Check here	if this	Summarized	multiple	الالا	<del>┊╵╵╵╏</del> ╂╂┼
43 A	04/28		04/28/22		9.98		00.00	Jaies	,
- 4	J 7 20	, 44	S	Yes		No	Yes	х	No
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<u> </u>		or (000 110.p)							
					$\Box\Box$			Ш	
44	3.00sh of SNA	P 10/21/2022	CALL \$11.00	Check here	if this	summarizes	multiple	sales	
A	10/21		10/20/22		0.00		85.00		1
			S	Yes	Х	No	Yes	Х	No
Check t	to use workshe	et (see help)	) ト		<u> </u>				
45	1.00sh of TSLA	01/20/2023	CALL \$250.00	Check here	if this	summarizes	multiple	sales	; ▶
A	11/01	/22	10/25/22	1,92	4.94	1,4	00.00		
			S	Yes	Х	No	Yes	Х	No
Check t	to use workshe	et (see help)		Yes	Х	No	Yes	Х	No
Check t	to use workshe	et (see help)		Yes	x []	No	Yes	X	No
			) •						
46	3.00sh of TSLA	02/18/2022	CALL \$950.00	Check here	if this	summarizes	s multiple		
		02/18/2022	CALL \$950.00 Various	Check here	if this 4 • 96	summarizes 8	s multiple	sales	
46 A	3.00sh of TSLA 02/14	02/18/2022 /22	CALL \$950.00 Various	Check here	if this 4 • 96	summarizes	s multiple	sales	
46 A	3.00sh of TSLA	02/18/2022 /22	CALL \$950.00 Various	Check here	if this 4 • 96	summarizes 8	s multiple	sales	
46 A	3.00sh of TSLA 02/14	02/18/2022 /22	CALL \$950.00 Various	Check here	if this 4 • 96	summarizes 8	s multiple	sales	
46 A Check t	3.00sh of TSLA 02/14 to use workshe	02/18/2022 /22 et (see help)	CALL \$950.00 Various S	Check here	if this 4.96	summarizes 8 No	s multiple 05.00 Yes	sales	No No
46 A Check t	3.00sh of TSLA 02/14 to use workshe 2.00sh of TSLA	d 02/18/2022 /22 et (see help)	CALL \$950.00 Various S  CALL \$900.00	Check here 96 Yes Check here	if this  4.96  X  if this	summarizes No Summarizes	s multiple 05.00 Yes West multiple	sales	No No
46 A Check t	3.00sh of TSLA 02/14 to use workshe	d 02/18/2022 /22 et (see help)	CALL \$950.00 Various S CALL \$900.00 Various	Check here 96 Yes Check here 1,79	if this 4.96 X if this 9.96	summarizes No Summarizes 1,1	s multiple 05.00 Yes which is multiple 65.02	x X x x x x x x x x x x x x x x x x x x	No No 250.02
46 A Check t	3.00sh of TSLA 02/14 to use workshe 2.00sh of TSLA 02/28	et (see help)  03/04/2022	CALL \$950.00 Various S CALL \$900.00 Various CALL \$900.00 Various S	Check here 96 Yes Check here	if this 4.96 X if this 9.96	summarizes No Summarizes	s multiple 05.00 Yes West multiple	x X x x x x x x x x x x x x x x x x x x	No No
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46 A Check t 47 A Check t	3.00sh of TSLA  02/14  to use workshe  2.00sh of TSLA  02/28  to use workshe	et (see help)  03/04/2022  1 03/04/2022  1 03/04/2022  1 03/04/2022	CALL \$950.00 Various S ) > CALL \$900.00 Various S ) > CALL \$900.00 Various S	Check here 96 Yes Check here 1,79 Yes	if this 4.96 x	summarizes  No  No  Summarizes  1,1  No	s multiple 05.00 Yes  Wes  Wes  Wes  Wes  Wes  Wes  Wes	x x x x x x x x x x x x x x x x x x x	No No 250.02 No
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49 8.00sh of TSLA 04/29/2022 CALL \$1,	000.00 Check here if t	his summarizes ı	multiple sales	
	ious 0.		4.00	•
S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►	<u> </u>			
50 3.00sh of TSLA 05/06/2022 CALL \$1,	000.00 Check here if t	his summarizes i	multiple sales	
A 05/04/22 Var	ious 849.	96 73	0.01	120.01
S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►	•	<u> </u>		
51 1.00sh of TSLA 10/21/2022 CALL \$2	220.00 Check here if t	his summarizes i	multiple sales	
A 10/17/22 10/1			0.00	•
S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►				
52 2.00sh of TSLA 10/28/2022 CALL \$2	220.00 Check here if t	his summarizes i	multiple sales	
A 10/21/22 10/2	0/22 879.	96 65	0.00	
S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶				
53 2.00sh of TSLA 10/28/2022 CALL \$2	220.00 Check here if t	his summarizes ı	multiple sales	
A 10/25/22 10/2	4/22 649.	96 29	0.00	
S	Yes X	No	Yes X	No
Check to use worksheet (see help) ▶	<del>-</del>			
54 5.00sh of 88160R101 TESLA, INC. COMMON	STOCK Check here if t	his summarizes ı	multiple sales	
A 10/25/22 10/1	9/22 1,118.	92 1,11	2.85	
S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►				

Form 1099-B Worksheet (Robinhood Markets Inc. as) -- Capital Asset Sales Wksht (1)

RQUICK

Continuation Statement

20A	1.00sh of CRM 05/13/2022 CALL \$190.00	0.00	214.00	-214.00S
	· ·			
21A	.00sh of DOCU 01/14/2022 CALL \$155.00		350.00	-338.02S
22A	1.00sh of FB 02/18/2022 CALL \$250.00	47.98	410.00	-362.02S
23A	2.00sh of GOOGL 01/20/2023 CALL \$100.00	849.97	802.00	47.97S
24A	8.00sh of GPS 03/11/2022 CALL \$15.00	119.96	84.00	35.96S
25A	7.00sh of META 01/20/2023 CALL \$135.00	699.96	586.00	113.96S
26A	1.00sh of MRNA 01/07/2022 CALL \$280.00	4.98	100.00	-95.02S
27A	1.00sh of MRNA 02/18/2022 CALL \$150.00	469.98	385.00	84.98S
28A	1.00sh of MSFT 01/20/2023 CALL \$250.00	814.97	750.00	64.97S
29A	1.00sh of NVDA 01/20/2023 CALL \$200.00	349.98	350.00	-0.02S
30A	2.00sh of NVDA 05/06/2022 CALL \$200.00	1,119.96	520.00	599.96S
31A	1.00sh of NVDA 05/06/2022 CALL \$200.00	354.98	300.00	54.98S
32A	1.00sh of NVDA 06/16/2023 CALL \$200.00	1,749.94	1,360.00	389.94s

33A	2.00sh of PINS 03/18/2022 CALL \$30.00	329.98	260.00		69.98S
34A	1.00sh of PTON 02/11/2022 CALL \$40.00	105.98	201.00		-95.02S
35A	1.00sh of PTON 02/11/2022 PUT \$35.00	53.98	209.00		-155.02S
36A	5.00sh of RBLW 03/18/2022 CALL \$60.00	11.98	610.00		-598.02S
37A	1.00sh of RIVN 01/20/2023 CALL \$35.00	349.98	200.00		149.98S
38A	8.00sh of SNAP 01/07/2022 CALL \$50.00	8.98	72.00		-63.02S
39A	5.00sh of SNAP 01/20/2023 CALL \$40.00	5.90	1,200.00		-1,194.10S
40A	19.00sh of SNAP 03/11/2022 CALL \$40.00	37.95	845.00		-807.05S
41A	2.00sh of SNAP 03/18/2022 CALL \$50.00	499.98	450.00		49.98S
42A	10.00sh of SNAP 03/18/2022 CALL \$50.00	884.94	1,038.02W	317.02	163.94S
43A	8.00sh of SNAP 06/17/2022 CALL \$30.00	749.98	600.00		149.98S
44A	8.00sh of SNAP 10/21/2022 CALL \$11.00	0.00	285.00		-285.00S
45A	1.00sh of TSLA 01/20/2023 CALL \$250.00	1,924.94	1,400.00		524.94S
46A	8.00sh of TSLA 02/18/2022 CALL \$950.00	964.96	805.00		159.96S
47A	2.00sh of TSLA 03/04/2022 CALL \$900.00	1,799.96	1,165.02W	250.02	884.96S
48A	1.00sh of TSLA 03/11/2022 CALL \$900.00	299.98	200.00		99.98S
49A	8.00sh of TSLA 04/29/2022 CALL \$1,000.00	0.00	464.00		-464.00S
50A	8.00sh of TSLA 05/06/2022 CALL \$1,000.00	849.96	730.01W	120.01	239.96S
51A	1.00sh of TSLA 10/21/2022 CALL \$220.00	809.97	520.00		289.97S
52A	2.00sh of TSLA 10/28/2022 CALL \$220.00	879.96	650.00		229.96S
53A	2.00sh of TSLA 10/28/2022 CALL \$220.00	649.96	290.00		359.96S
54A	5.00sh of 88160R101 TESLA, INC. COMMON STOCK	1,118.92	1,112.85		6.07S

## Form 1099-B Worksheet (National Financial Services LLC) -- Capital Asset Sales Wksht (1) TQUICK Continuation Statement

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5	PALANTIR	TECHNOLO	GIES IN	C CL	A 30	Chec	k here i	f this	sum	marize	es m	ultiple	e sal	es		. >	
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Check t	to use wor	ksheet (se	e help)	<b>•</b>	C	)	•										
		0.00													Х		
									$\prod$								
6	PALANTIR	TECHNOLO	GIES IN	C CL	A 30	Chec	k here i	f this	sum	marize	es m	ultiple	e sal	es		. ►	
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		0.00													Х		
												ШШ					
7	PALANTIR	TECHNOLO	GIES IN	C CL	A 50	Chec	k here i	f this	sum	marize	es m	ultiple	e sal	es		. •	
A	01	1/24/22	(	)2/0	8/21		593	.84		1,	975	.01				0.	00
				S			Yes	Х		No		Yes	X			No	
Check t	to use wor	ksheet (se	ee help)	•	C	)											
		0.00													Х		
8	SORRENTO	THERAPEUT	ICS INC	COMUS	SD 200	Chec	k here i	f this	sum	marize	es m	ultiple	e sal	es		. ▶	
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Check t	to use wor	ksheet (se	e help)	<b>•</b>	C	)	-										
		0.00							•						Х		

## Form 1099-B Worksheet (National Financial Services LLC) -- Capital Asset Sales Wksht (1) TQUICK Continuation Statement

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h		0.00	<del></del>					<del></del>	++		X	+++
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	1 0	1.44.44		1/ <b>4</b> 1		Yes X	<u> </u>	No	Yes	Х		0.00 No
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A	0	1/24/22	05/2	8/21		226.0	53	60	0.00			0.00
			S			Yes X		No	Yes	Х	1	No
Checl	k to use wo	orksheet (se	e help) ►	C	)					Щ.	Ш	
<u>L</u>		0.00				<del></del>				$\coprod$	Х	
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1				SD 50	Chec			ımmarizes ı		sales		<b></b>
A	0	1/24/22	06/2	8/21	<u> </u>	153.5	51		5.00			0.00
			S			Yes X	Ш	No	Yes	Х	1	No
Chec	k to use wo	orksheet (se	ee help) 🕨	C	)				+		$\coprod$	+
<del>                                     </del>		0.00	<del></del>		$\Box$			<del></del>	+++-	+++	X	+++
ШШ				$\bot \bot \bot \bot$			Ш		$\perp \perp \perp \perp$	Ш	ШЦ	ЩЩ

### Electronic Filing Instructions for your 2022 Georgia Tax Return

Important: Your taxes are not finished until all required steps are completed.



Nagarjuna & Rajyalakshmi Panamala 2480 Crimson Downs Dr Cumming, GA 30040-5534

Balance Due/ Refund	Your Georgia state tax return (Form 500) shows a refund due to you in the amount of \$382.00. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 720771810 Routing Transit Number: 322271627.									
Where's My Refund?	Before you call the Georgia Department of Revenue with questions about your refund, give them 90 business days processing time from the date your return is accepted. If then you have not received your refund, or the amount is not what you expected, contact the Georgia Department of Revenue directly at 1-877-423-6711. You can also visit the Georgia Department of Revenue web site at https://gtc.dor.ga.gov/_/.									
What You Need to Sign	Sign and date Form GA-8453 within 1 day of acceptance. Since you are   married filing jointly, your spouse must also sign and date the form.									
Do Not Mail		Do not mail a paper copy of your tax return. Since you filed electronically, the Georgia Department of Revenue already has your return.								
What You Need to Keep	Your Electronic Filing Instruct   Form GA-8453 and attachment(see	· 3)	orm)							
2022 Georgia	   Taxable Income   Total Tax	\$ \$ \$	110,487.00 6,118.00 6,500.00							



#### ERO MUST RETAIN THIS FORM. **DO NOT SUBMIT THIS FORM TO** GEORGIA DEPARTMENT OF REVENUE

UNLESS REQUESTED TO DO SO.



**GA-8453** 2022

# IRS DCN OR SUBMISSION ID

GEORGIA INDIVIDUAL INCOME TAX DECLARATION FOR ELECTRONIC FILING SUMMARY OF AGREEMENT BETWEEN TAXPAYER AND ERO OR PAID PREPARER Amended Return Last Name First Name and Initial Social Security Number NAGARJUNA PANAMALA 880-41-8370 If Joint Return, Spouse's First Name and Initial Spouse's Last Name Spouse's Social Security Number PANAMALA RAJYALAKSHMI 758-37-1934 Daytime Telephone Number Home Address (number and street) Apt Number 2480 CRIMSON DOWNS DR 818-404-9865 City, Town or Post Office State CUMMING 30040-5534 GA PART I TAX RETURN INFORMATION 1. Federal Adjusted Gross Income (Form 500 or Form 500X, Line 8; Form 500EZ, Line 1) ...... 130987 2. Georgia Taxable Income (Form 500 or Form 500X, Line 15c; Form 500EZ, Line 3) ...... 2. 110487 3. Net Georgia Tax (Form 500 or Form 500X, Line 22; Form 500EZ, Line 6)........ 3. 6118 4. Balance Due (Form 500, Line 43; Form 500X, Line 37; Form 500EZ, Line 22) ...... 4. 5. 5. Refund (Form 500, Line 44; Form 500X, Line 38; Form 500EZ, Line 23) ...... 382 PART II **DECLARATION OF TAXPAYER(S)** Under penalties of perjury, I declare that the information I have provided to my Electronic Return Originator (ERO) and/or Online Service Provider and/or Transmitter and the amounts shown in Part I agree with the amounts shown on the corresponding lines of the electronic portion of my 2022 Georgia Income Tax Return. I declare that I have examined my tax return, including accompanying schedules and statements, and to the best of my knowledge and belief, my return is true, correct and complete. I consent that the electronic portion of my return may be sent by my ERO/Online Service Provider/Transmitter. SIGN HERE TAXPAYER'S SIGNATURE SPOUSE'S SIGNATURE (if joint return, both must sign) Date **EMAIL ADDRESS** PRINT NAME DECLARATION OF ELECTRONIC RETURNS ORIGINATOR AND PAID PREPARER PART III I DECLARE THAT I HAVE REVIEWED THE AROVE TAXPAYER'S RETURN AND THAT THE ENTRIES ON THE GA-8453 ARE COMPLETE AND CORRECT TO THE BEST OF MY KNOWLEDGE. ERO's Signature ERO's Firm's Name Check also if paid preparer Use FEIN/PTIN \_\_ Only City, State, & Zip Code SSN/TIN\_ IF PREPARED BYANY PERSON OTHER THAN THE TAXPAYER, THIS DECLARATION IS BASED ON ALL INFORMATION OF WHICH THE PREPARER HAS ANY KNOWLEDGE. Paid Preparer's Signature SELF PREPARED Paid Firm's Name Preparer's Address SSN/TIN -**Use Only** 

GA-8453 (REV 05/24/22)

City, State, & Zip Code

#### KEEP A COPY WITH YOUR RECORDS





Georgia Form 500 (Rev. 06/22/22)
Individual Income Tax Return
Georgia Department of Revenue
2022 (Approved software version)

Page 1

Fiscal Year Beginning

STATE GA

Fiscal Year Ending YOUR DRIVER'S LICENSE/STATE ID

061166152

YOUR FIRST NAME

1. NAGARJUNA

MI YOUR SOCIAL SECURITY NUMBER 880-41-8370

LAST NAME (For Name Change See IT-511 Tax Booklet)
PANAMALA

SUFFIX

\_\_\_\_\_\_

SPOUSE'S FIRST NAME RAJYALAKSHMI

SPOUSE'S SOCIAL SECURITY NUMBER

**SUFFIX** 

758-37-1934

DEPARTMENT USE ONLY

LAST NAME
PANAMALA

ADDRESS (NUMBER AND STREET or P.O. BOX) (Use 2nd address line for Apt, Suite or Building Number) CHECK IF ADDRESS HAS CHANGED

2. 2480 CRIMSON DOWNS DR

CITY (Please insert a space if the city has multiple names)

3. CUMMING

STATE ZIP CODE

GA 300405534

(COUNTRY IF FOREIGN)

A. Single B. Married filing joint C. Married filing separate (Spouse's social security number must be entered above) D. Head of Household or Qualifying Surviving Spouse

6. Number of exemptions (Check appropriate box(es) and enter total in 6c.) 6a. Yourself  $\times$  6b. Spouse  $\times$  6c. 2



2022

Page 2

YOUR SOCIAL SECURITY NUMBER 880-41-8370

7h Danamadanda (16 have mann than 4 dana		
<ol> <li>Dependents (If you have more than 4 depe First Name, MI.</li> </ol>	Last Name	
ADITI K	PANAMALA	
	1 111/11 11 111/11	
Social Security Number	Relationship to You	
947-94-9107	DAUGHTER	
First Name, MI.	Last Name	
ABHINAV	PANAMALA	
Casial Casumity Number	Deletienship to Vou	
Social Security Number 060-61-9446	Relationship to You SON	
000-01-2440	BON	
First Name, MI.	Last Name	
,		
Social Security Number	Relationship to You	
First Name MI	Last Name	
First Name, MI.	Last Name	
Social Security Number	Relationship to You	
INCOME COMPLITATIONS		
INCOME COMPUTATIONS	and the minute size ( ). Frequely 0450	
If amount on line 8, 9, 10, 13 or 15 is negative,	use the minus sign (-). Example -3456.	
8. Federal adjusted gross income (From Federal	Form 1040) 8.	130987
	the amount on Line 8 is \$40,000 or more, or your gross i	
W-2s you must include a copy of your Feder	al Form 1040 Pages 1, 2, and Schedule 1.	
9. Adjustments from Form 500 Schedule 1 (See	IT-511 Tax Booklet) 9.	
10. Georgia adjusted gross income (Net total of L	ine 8 and Line 9) 10.	130987
11 Standard Deduction (Denet use FEDERAL C	TANDADD DEDUCTION)	7100
11. Standard Deduction (Do not use FEDERAL S' (See IT-511 Tax Booklet)	TANDARD DEDUCTION) 11a.	7100
	otal x 1,300= 11b.	
Spouse: 65 or over? Blind?	X 1,000	
c. Total Standard Deduction (Line 11a + Line	11b) 11c.	7100
Use EITHER Line 11c OR Line 12c (Do not wi		
12. Total Itemized Deductions used in computing Fe	deral Taxable Income. If you use itemized deductions, you	must include Federal Schedule A
a. Federal Itemized Deductions (Schedule A-	Form 1040) 12a.	
b. Less adjustments: (See IT-511 Tax Bookle	t) 12b.	
c. Georgia Total Itemized Deductions		
5. Joseph Four Romazou Doudollomo	120.	
13. Subtract either Line 11c or Line 12c from Line	e 10; enter balance 13.	123887



230041153

YOUR SOCIAL SECURITY NUMBER 880-41-8370

7400

2022

Page 3

14a. Enter the number from Line 6c.  $\,2\,$  Multiply by \$2,700 for filing status A or D  $\,$  14a.

	or multiply by \$	\$3,700 for filir	ng status B or	С		_					
14b	. Enter the numb	per from Lin	e 7a. 2 N	lultiply b	y \$3,000		14b.				6000
14c	4c. Add Lines 14a. and 14b. Enter total					14c.				13400	
	<ul> <li>ia. Income before GA NOL (Line 13 less Line 14c or Schedule 3, Line 14)</li> <li>ib. Georgia NOL utilized (Cannot exceed Line 15a or the amount after applying the 80% limitation, see IT-511 Tax Booklet for more information).</li> </ul>									110487	
15c	. Georgia Taxab	ole Income (	Line 15a les	s Line 1	5b)		15c.				110487
16.	Tax (Use Tax	Rate Sched	lule in the IT	511 Ta	x Booklet)		16.				6118
17.	Low Income (	Credit 1	7a.	17b.			17c.				
18.	Other State(s)	Tax Credit	(Include a co	opy of th	ne other state(	s) return)	18.				
19.	Credits used fr	rom IND-CF	R Summary \	Vorkshe	et		19.				
20.	Total Credits electronically		Schedule 2	Georgi	a Tax Credits	(must be	filed 20.				
21.	Total Credits Use	•	nes 17-20) ca	nnot exc	eed Line 16		21.				0
22.	Balance (Line	16 less Line	e 21) if zero o	or less th	an zero, enter	zero	. 22.				6118
GΑ		. For other i	ncome state			•					G2-As on Line 4 Form G2-LP Line
	(INCOME STATE	MENT A)			(INCOME STA	TEMENT B)			(INCOME STAT	EMENT C)	
1.	WITHHOLDING T	ТҮРЕ:		1.	WITHHOLDING	3 TYPE:		1.	WITHHOLDING	TYPE:	
	× w-2	G2-A	G2-LP		W-2	G2-A	G2-LP		W-2	G2-A	G2-LP
	1099	G2-FL	G2-RP		1099	G2-FL	G2-RP		1099	G2-FL	G2-RP
2.	EMPLOYER/PAY ID NUMBER (FEI			2.	EMPLOYER/PA ID NUMBER (F		AL SN	2.	EMPLOYER/PA ID NUMBER (FE		
	3518358	18									
3.	EMPLOYER/PAY		/ITHHOLDING	ID 3.	EMPLOYER/PA	AYER STATE	WITHHOLDING ID	3.	EMPLOYER/PA	YER STATE \	WITHHOLDING ID
4.	GA WAGES / INC	оме 33969		4.	GA WAGES / II	NCOME		4.	GA WAGES / IN	COME	
5.	GA TAX WITHHE	ELD 6500		5.	GA TAX WITH	HELD		5.	GA TAX WITHH	ELD	

PLEASE COMPLETE INCOME STATEMENT DETAILS ON PAGE 4.

This Page (3) is required for processing

REV 01/03/23 TTMAC

22

T1

01 1555 115 2022 GA

INTUIT



2300411544

YOUR SOCIAL SECURITY NUMBER 880-41-8370

### Page 4

	(INCOME STATEMENT D)				(INCOME STAT	EMENT E)		(INCOME STATEMENT F)					
1.	WITHHOLDING TYPE: 1.		1.	WITHHOLDING		1.	WITHHOLDING TYPE:						
	W-2 G	2-A G	2-LP		W-2	G2-A	G2-LP		W-2	G2-A	G2-LP		
	1099 G	2-FL G	2-RP		1099	G2-FL	G2-RP		1099	G2-FL	G2-RP		
2.	EMPLOYER/PAYER	FEDERAL		2.	EMPLOYER/PA	YER FEDERA	\L	2.	EMPLOYER/PAY	ER FEDERAL			
	ID NUMBER (FEIN)	SSN			ID NUMBER (FE	IN) SS	N		ID NUMBER (FEI	N) SSN			
3.	EMPLOYER/PAYER	STATE WITH	IHOLDING ID	3.	EMPLOYER/PA	YER STATE	WITHHOLDING ID	3.	EMPLOYER/PA	YER STATE W	ITHHOLDING ID		
4.	GA WAGES / INCOM	ИE		4.	GA WAGES / IN	ICOME		4.	GA WAGES / IN	COME			
_	CA TAY WITHUELD			5.	CA TAY WITHI	IEI D		_	CA TAY WITHIN	EL D			
5.	GA TAX WITHHELD			Э.	GA TAX WITHH	IELD		5.	GA TAX WITHH	ELD			
23	Georgia Income	Tax Withhe	ld on Wane	s an	d 1099s		. 23.				6500		
20.	(Enter Tax Withhe						. 20.				0300		
24	Other Georgia In	ncome Tax	Withheld				24.						
	(Must include G2-	-A, G2-FL, G	2-LP and/or 0	32-R	P)		=						
25.	Estimated Tax p	aid for 2022	and Form I	Γ-56	O		25.						
	•												
26.	Schedule 2B Ref	undable Tax	c Credits				26.						
	(Cannot be claim	ned unless f	iled electroni	ically	<b>'</b> )								
27.	Total prepayment	t credits (Ad	d Lines 23, 2	24, 2	5 and 26)		. 27.				6500		
28.	If Line 22 exceed												
	balance due						28.						
29.													
	overpayment						29.				382		
											0		
30.	Amount to be co	redited to 2	023 ESTIMA	TEL	) TAX		30.				0		
0.4	Coordia Wildlife	Camaamiatia	on Fund (No.	:£4 .	of loop them 64	00)	31.						
31.	Georgia Wildlife	Conservan	on Fund (NO	giit	oniess man pi	.00)	51.						
20	Georgia Fund fo	r Children	and Eldorly (N	No a	ift of loce than	¢1 00\	32.						
32.	Georgia Fund io	or Criniciteria	ind Eldeny (i	vo g	iit oi iess tiiaii	φ1.00)	. 02.						
33.	Georgia Cancer	Research F	Fund <b>(No aift</b>	of le	see than \$1 00	١	33.						
55.	occigia caricoi	rtoocaronii	ana (ito giit	0	,00 than \$ 1.00	,	•						
34.	Georgia Land Co	onservation	Program (No	aift	of less than \$	1.00)	34.						
04.	g		9 (	· J	,	,							
35.	Georgia Nationa	l Guard Fou	ndation (No	gift o	of less than \$1	.00)	35.						
	<u>-</u>		•	_		•							
36.	Dog & Cat Sterili	ization Fund	(No gift of I	ess	than \$1.00)		. 36.						
37.	Saving the Cure	Fund (No g	jift of less th	an \$	1.00)		. 37.						
					(25.01								
38.	Realizing Education		nent Can Hap	pen	(REACH) Progra	am	38.						
	(No gift of less t	.nan \$1.00)	<b>TU:</b> 5		. (4) !-						_		



YOUR SOCIAL SECURITY NUMBER 880-41-8370

Page 5

39. Public Salet	y Memoriai Grar	ιι (No giπ of less than \$	.1.00)	39.		
40. Form 500 U	ET (Estimated t	tax penalty) 500 UET	exception attached	40.		
41. Penalty: Lat	te Payment and/	or Late Filing		41.		
42. Interest				42.		
MAKE CHE Mail To: GE	CK PAYABLE T	3, 31 thru 42 O GEORGIA DEPARTME IMENT OF REVENUE PR GA 30374-0399	NT OF REVENUE,			
44. (If you are d	ue a refund) Sub	otract the sum of Lines 30	thru 42 from Line 29			
				44.		382
	Mail To: GEORG 380 ATLANTA, G	IA DEPARTMENT OF RE A 30374-0380	VENUE PROCESSING	CENTER,		
If you do no	t enter Direct I	Deposit information or	if you are a first tim	ne filer you will	be issued a paper check.	
44a. Direct Deposi			Savings	•		
Routing			Accou	unt		
Number 322	271627		Numb	oer 7207718	10	
Taxpayer's Sig	gnature	(Check box if deceased)	Spouse's	Signature	(Check box if deceased)	
Taxpayer's Da	te of Death		Spouse's	Date of Death		
Taxpayer's Sig	gnature Date					
By providing my omy account(s).			r's Phone Number 104–9865		Spouse's Signature Date	
. ,		818-4	104-9865	tronically notify me a	Spouse's Signature Date	any updates to
Taxpayer's E-		818-4	104-9865	tronically notify me a	at the below e-mail address regarding a	iscuss this return
. ,		818-4	104-9865	tronically notify me a	at the below e-mail address regarding a	iscuss this return
. ,		818-4	104-9865		at the below e-mail address regarding a	iscuss this return
Taxpayer's E-	mail Address  Preparer parer Other Thar	818–4	104-9865		at the below e-mail address regarding a  I authorize DOR to d with the named prep  S Phone Number	iscuss this return

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

2022

OMB No. 1545-0074

IRS Use Only-Do not write or staple in this space.

person is a child but not your dependent:  Nagar juna    It point return, spouse's first name and middle initial   It point return, spouse's social security number   April 10	Filing Status Check only one box.				ed filing separately (						spou	se (QSS)	-
Nagar juna	ONC DOX.				our spouse. It you c	, icon	ica inc morror	i QOC	box, cite		illa 3	mariic ii tii	qualifying
If joint rotum, spouse's first name and middle initial  Rajyalakshmi Panamala  Panamala  Apt. no.  Apt. no.  Apt. no.  Apt. no.  Clay town, or post office. If you have a P.O. box, see instructions.  Apt. no.  Clay town, or post office. If you have a freegn address, also complete spaces below.  State  ZIP code  Ago 0534  Ago 0405534  Ago 040534  Ago 04054	Your first name	and mi	ddle initial	Last na	me					Y	our soc	cial security	number
Rajyalakshmi	Nagarjuna				mala					8	80-4	1-8370	)
Apt. no.   Crimson   Downs   DT	If joint return, sp	oouse's	first name and middle initial	Last na	me					Sį	oouse's	s social sec	urity number
Check here if you, or your   City, town, or post office. If you have a foreign address, also complete spaces below.   State	Rajyalak	shmi	Ĺ	Pana	mala					7	58-3	37-1934	:
Common   C				instructio	ons.				Apt. no.	Pı	resider	ntial Electio	n Campaigr
Comming  Foreign country name  Foreign province/state/county  Foreign postal code  your tax or refund.  Vou	2480 Cri	.msor	n Downs Dr										
Foreign country name    Foreign province/state/country   Foreign prostate country   Foreign prostate country   Foreign province/state/country   Foreign prostate country   Foreign prostate   Foreign prost	City, town, or p	ost offic	ce. If you have a foreign address, also cor	nplete s <sub>l</sub>	paces below.	Sta	ite	ZIP	code			0,	•
Foreign province/state/county	Cumming					G <i>I</i>	A	30	040553	4	_		_
Digital Assets Assets  At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions).  □ Yes  ☒ No Standard Deduction  Age/Blindness  You:  □ Were born before January 2, 1958  □ Are blind Spouse:  □ Was born before January 2, 1958  □ Is blind  Dependents (see instructions):  (1) First name  □ Last name  □ You you were a dual-status alien  Dependents (see instructions):  (1) First name  □ Last name  □ You you were a dual-status alien  Dependents (see instructions):  (1) First name  □ Last name  □ You you were and you were a dual-status alien  Aditi K Panamala  947-94-9107 Daughter  □  □  □  □  □  □  □  □  □  □  □  □  □		name		F	oreign province/state/	coun'	ty	Forei	gn postal c				J.
Assets  exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)												You	Spouse
Standard Deduction   Someone can claim:	Digital			,				•		. ,			<b>N</b>
Age/Blindness   Vou:   Were born before January 2, 1958   Are blind   Spouse:   Was born before January 2, 1958   Is blind   Dependents   (see instructions):   (2) Social security     (3) Relationship     (4) Check the box if qualifies for (see instructions):   (4) Check the box if qualifies for (see instructions):   (6) Check the box if qualifies for (see instructions):   (7) Child tax credit   Credit for other dependent	-							asset	:)? (See in	structi	ons.)	∐ Yes	X No
Dependents   See instructions   Company   Co	Standard Deduction						•						
If more	Age/Blindness	You:	☐ Were born before January 2, 19	958	Are blind <b>Sp</b>	ouse	: Was bor	rn bef	ore Janua	ary 2, 1	958	Is blii	nd
If more than four dependents   Adition   Adition   Anithment   Adition   A	Dependents	(see	instructions):		(2) Social securit	У	(3) Relationsh	nip (	4) Check t	he box i	f qualifi	ies for (see i	nstructions):
than four dependents, see instructions defered here control of the property of	•	•	*			,	to you	.	Child t	ax cred	it (	Credit for oth	er dependents
dependents, see instructions and check here  Income  I		Adi	ti K Panamala		947-94-910	7	Daughter		[			>	<b>(</b>
Income In		Δhh			060-61-944	6	Son			X			
Income Attach Form(s) W-2 here. Also attach Forms W-2 here. Also attach Forms W-2 here. Also attach Forms W-2 mere. Also attach Forms W-2 mere		,											
Attach Form(s) W-2 here. Also attach Forms W-2 here. Also attach Forms W-2 and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.  Attach Sch. B if required.  Attach Sch. B if required.  Attach Sch. B if required.  Attach Grant Was dines 1 and	here $\square$												
Hattach Form(s) W-2 here. Also W-2 here. Also W-2 and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.  Z Add lines 1 a through 1h  Attach Sch. B if required.  3a Qualified dividends 3b Dordinary dividends 3c Sciala security benefits 3c Sciala security benefits 3c Sciala group.  Add lines 1 a through 1h  Add lines 1 a	Income	1a	Total amount from Form(s) W-2, bo	x 1 (see	e instructions) .						1a	13	3,986.
W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions  W-2, see instructions.  Add lines 1a through 1h  Tax-exempt interest 2a b Taxable interest 2b 1.  Add lines 1a through 1h  Tax-exempt interest 2a b Taxable amount 4b  Standard Deduction for Married filing separately, \$12,950  Married filing supriving spouse, \$12,950  Head of household, \$19,400  Head of household, \$19,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you checked and 199-R is is your at a speciment of the propose income 15 household, \$19,400  If you checked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elected under \$20,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you elected and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 15 household, \$19,400  If you elecked and 199-R is is your adjusted gross income 199-R is is your tay adjusted gross income 15 household, \$19,400  If you elecked and 199-R is income 199-R is income 199-R incom	meome	b	Household employee wages not re	ported	on Form(s) W-2 .						1b		
attach Forms W-2G and 1099-Ri if tax was withheld. If you did not get a Form M-2c, see instructions.  9 Wages from Form 8919, line 6	` '	С	Tip income not reported on line 1a	(see ins	structions)						1c		
1099-R if tax was withheld.  If Employer-provided adoption benefits from Form 8839, line 29  If you did not get a Form W-2, see instructions.  In Nontaxable combat pay election (see instructions)  In Nontaxable		d	Medicaid waiver payments not repo	orted or	n Form(s) W-2 (see	instru	uctions)				1d		
## Attach Sch. B if required.		е	Taxable dependent care benefits fr	om For	m 2441, line 26						1e		
get a Form W2-2, see instructions.    Substract Filing or Married filing separately, \$12,950		f	Employer-provided adoption benef	its from	Form 8839, line 29						1f		
get a Form W-2, see instructions.  In the se		g	Wages from Form 8919, line 6 .								1g		
Instructions.  I Nontaxable combat pay election (see instructions)	get a Form	h	Other earned income (see instruction	ons) .				٠, .			1h		0.
Attach Sch. B Attach Sch. B Attach Sch. B Attach Sch. B If required.  2a		i	Nontaxable combat pay election (s	ee instr	uctions)		1i	i					
If required.  3a Qualified dividends . 3a b Ordinary dividends . 3b 0.  4a IRA distributions		Z	Add lines 1a through 1h	. , .							1z	13	3,986.
4a IRA distributions . 4a b Taxable amount . 4b  Standard Deduction for—Single or Married filing separately, \$12,950  Married filing jointly or Qualifying surviving spouse, \$25,900  Head of household, \$19,400  The subtract line 10 from line 9. This is your adjusted gross income  15 Add lines 12 and 13  Deduction, \$15,087  Add lines 12 and 13  Line 14 from line 11 If zero or less enter -0. This is your taxable income  b Taxable amount . 5b  Taxabl	Attach Sch. B	<b>2</b> a	Tax-exempt interest 2	2a		<b>b</b> T	axable interest	t.			2b		1.
Standard Deduction for—Single or Married filing separately, \$12,950  Married filing jointly or Qualifying sourviving spouse, \$25,900  Head of household, \$19,400  If you checked any box under Standard Deduction, \$2000.  Add lines 12 and 13  Qualified business income deduction from Form 8995 or Form 8995-A  Beautiful of the source of the	if required.	3a	Qualified dividends 3	3a		<b>b</b> C	ordinary divide	nds .			3b		0.
Comparison of the diling separately, \$12,950   Total gain or (loss). Attach Schedule D if required. If not required, check here (see instructions)   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not required, check here   Total gain or (loss). Attach Schedule D if required. If not require		4a	IRA distributions 4	la		b T	axable amoun	ıt			4b		
Single or Married filing separately, \$12,950 7 Capital gain or (loss). Attach Schedule D if required. If not required, check here \$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Standard	5a	<del></del>	ia 📗		b T	axable amoun	ıt			5b		
Married filing separately, 7 Capital gain or (loss). Attach Schedule D if required. If not required, check here		6a						ıt			6b		
\$12,950	Married filing	С	If you elect to use the lump-sum ele	ection r	nethod, check here	(see	instructions)			. $\sqcup$			
jointly or Qualifying spouse, \$25,900  Head of household, \$19,400  If you checked any box under Standard Deduction, Deduc		7	, ,		required. If not req	uired	, check here			. Ц	7	_	3,000.
Qualifying surviving spouse, \$25,900     4dd lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income     9     130, 987.       Head of household, \$19,400     12     Subtract line 10 from line 9. This is your adjusted gross income     11     130, 987.       If you checked any box under Standard Deduction, Deduction, 15     14     Add lines 12 and 13     14     25, 900.       15     Subtract line 14 from line 11 If zero or less enter -0- This is your taxable income     15     10	Married filing	8	,								8		
Subtract line 10 from line 9. This is your adjusted gross income  Subtract line 10 from line 9. This is your adjusted gross income  Standard deduction or itemized deductions (from Schedule A)  Standard deduction or itemized deductions (from Sendule A)  Qualified business income deduction from Form 8995 or Form 8995-A  Add lines 12 and 13  Add lines 12 and 13  Subtract line 14 from line 11. If zero or less enter -0- This is your taxable income	Qualifying	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,	and 8.	This is your <b>total in</b>	com	e				9	13	0,987.
Head of household, \$19,400  It you checked any box under Standard Deduction, Deduction, Deduction, 15  Nubtract line 10 from line 9. This is your adjusted gross income		10	Adjustments to income from Scheo	dule 1, I	ine 26						10		
\$19,400	Head of	11		•							11		
any box under Standard  14 Add lines 12 and 13		12									12	2	5,900.
Standard         14         Add lines 12 and 13         1.	If you checked	13									13		
	Standard										14		
		15	Subtract line 14 from line 11. If zero	or less	s, enter -0 This is y	our 1	taxable incom	ne .			15	10	5,087.

Form 1040 (2022	2)									Page 2	
Tax and	16	Tax (see instructions). Check	if any from Form	n(s): <b>1</b> 881	4 <b>2</b> 🗌 4972	3 🗌		. 16	3 14	1,353.	
Credits	17	Amount from Schedule 2, lir					<del></del> .	. 17	7		
	18	Add lines 16 and 17						. 18	3 14	1,353.	
	19	Child tax credit or credit for	other dependen	ts from Sched	ule 8812			. 19	9 2	2,500.	
	20	Amount from Schedule 3, lir	ne 8					. 20			
	21	Add lines 19 and 20						. 2	1 2	2,500.	
	22	Subtract line 21 from line 18	B. If zero or less,	enter -0				. 22	2 13	1,853.	
	23	Other taxes, including self-e	mployment tax,	from Schedule	e 2, line 21			. 23		0.	
	24	Add lines 22 and 23. This is						. 24	4 17	1,853.	
Payments	25	Federal income tax withheld								·	
,	а	Form(s) W-2				25a	14,0	67.			
	b	Form(s) 1099				25b					
	С	Other forms (see instruction				25c					
	d	Add lines 25a through 25c	•					. 25	d 14	1,067.	
16	26	2022 estimated tax paymen	ts and amount a	pplied from 20	021 return			. 26			
If you have a qualifying child,	27	Earned income credit (EIC)			No .	27					
attach Sch. EIC.	28	Additional child tax credit from				28					
	29	American opportunity credit	from Form 8863	3. line 8		29					
	30	Reserved for future use .		-		30					
	31	Amount from Schedule 3, lir	ne 15			31					
	32	Add lines 27, 28, 29, and 31					its .	. 32	2		
	33	Add lines 25d, 26, and 32. T	•	-	-					1,067.	
Defund	34	If line 33 is more than line 24						. 34	1 2	2,214.	
Refund	35a	Amount of line 34 you want	•					35		2,214.	
Direct deposit?	b	Routing number 3 2 2				Checking	Savi	ngs			
See instructions.	d	Account number 7 2 0 7 7 1 8 1 0									
	36	Amount of line 34 you want applied to your 2023 estimated tax									
Amount You Owe	37	Subtract line 33 from line 24 For details on how to pay, g		•				. 37	7		
	38										
Third Party Designee		you want to allow another	•		rn with the IRS?		s. Comp	lete belov	w. 🔀 No		
J	Designee's			Phone Personal					on n		
0:		me	Nest Lieuwe sussia	no.			number (f				
Sign		der penalties of perjury, I declare the lief, they are true, correct, and com									
Here	Yo	ur signature		Date	Your occupation		1	If the IRS	sent you an lo	dentity	
									n PIN, enter it l	here	
Joint return?					Software E	Ingineer		(see inst.)			
See instructions. Keep a copy for	Sp	ouse's signature. If a joint return,	<b>both</b> must sign.	Date	Spouse's occupation	on			sent your spor		
your records.						(see inst.)		There is nere			
	———Ph	one no. (818)404-986	5	Email address	Homemaker			, ,			
		eparer's name	Preparer's signat			Date	PT	IN	Check if:		
Paid		•							l	employed	
Preparer	——Fin	m's name Self-Pr	epared			1		Phone no			
Use Only									Firm's FIN		