# Form **8879**

(Rev. January 2021)

Department of the Treasury Internal Revenue Service

# IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

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

OMB No. 1545-0074

Submission Identification Number (SID)			-		
Taxpayer's name	Soc	cial securit	ty numb	er	
JAYARAMUDU DASARI	7	10-54	-9042	2	
Spouse's name	Spo	ouse's soc	ial secu	rity numb	er
SANDHYA RANI GUMMANOOR	7	751-74	-311	5	
Part I Tax Return Information — Tax Year Ending December 31, 2023	(Enter yea	ar you a	re aut	horizin	g.)
Enter whole dollars only on lines 1 through 5.					
Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.					
1 Adjusted gross income			1		3,284.
2 Total tax			2		2,629.
<b>3</b> Federal income tax withheld from Form(s) W-2 and Form(s) 1099			3		1,174.
4 Amount you want refunded to you			4		
5 Amount you owe			5		1,516.
Part II Taxpayer Declaration and Signature Authorization (Be sure you ge Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or a	-				
return (original or amended) I am now authorizing. I consent to allow my intermediate service provider to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reasor for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authority against a ACH electronic funds withdrawal (direct debit) entry to the financial institution acc payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancella business days prior to the payment (settlement) date. I also authorize the financial institutions involve taxes to receive confidential information necessary to answer inquiries and resolve issues related personal identification number (PIN) below is my signature for the income tax return (original or amer Electronic Funds Withdrawal Consent.	on for rejection ize the U.S. To count indicated institution to terminate the ation requests ed in the payments of the payments.	n of the treasury and in the tand debit the authorization must be essing of ent. I furt	ransmis ax prep entry to ation. The receivent the election acl	sion, (b) lesignate aration s o this acc o revoke ved no la ectronic p knowledge	the reason of Financial oftware for count. This e (cancel) a ater than 2 cayment of ge that the
Taxpayer's PIN: check one box only					٦
X I authorize GLOBAL TAXES LLC to enter or get	enerate mv F	$_{IN}$ $\lfloor \frac{4}{2} \rfloor$	9 0	4 2	as my
ERO firm name signature on the income tax return (original or amended) I am now authorizing.	onorate my r	Ent		digits, but r all zeros	t
I will enter my PIN as my signature on the income tax return (original or amended if you are entering your own PIN and your return is filed using the Practitioner Pi below.					
Your signature ▶D	oate ►				
Spouse's PIN: check one box only					
★ I authorize GLOBAL TAXES LLC to enter or get a content of the content	enerate my E	PIN 4	3 1	1 5	ac my
ERO firm name	enerate my r			digits, but	
signature on the income tax return (original or amended) I am now authorizing.				r all zeros	
I will enter my PIN as my signature on the income tax return (original or amended if you are entering your own PIN <b>and</b> your return is filed using the Practitioner Pibelow.					
-1	oate ►				
Practitioner PIN Method Returns Only—continue	e below				
Part III Certification and Authentication — Practitioner PIN Method Only					
<b>ERO's EFIN/PIN.</b> Enter your six-digit EFIN followed by your five-digit self-selected PIN.	2 2 2	4 9 Don't ente	6 0 er all ze		7 1
I certify that the above numeric entry is my PIN, which is my signature for the electronic individual in authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I a requirements of the Practitioner PIN method and <b>Pub. 1345,</b> Handbook for Authorized IRS <i>e-file</i> Provi	am submitting	g this retu	ırn in a	ccordand	
ERO's signature ▶ D	oate ►				
FRO Must Patain This Form — See Instruct	ione				

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

E1040 Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return

2023

OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan	. 1–Ded	c. 31, 2023, or other tax year beginning		, 2023, end	ling _		, 20		See sep	parate instructions.
Your first name	and m	niddle initial	Last na	ame					Your so	cial security number
JAYARAMU	IDII		DASA	ART					710	54 9042
		s first name and middle initial	Last na							s social security numbe
SANDHYA	RAN	Т	GUMN	MANOOR					751	74   3115
		er and street). If you have a P.O. box, see					Apt. no.			ntial Election Campaigr
2655 Riv	er	Plaza Dr					254		Check h	ere if you, or your
		ice. If you have a foreign address, also co	mplete s	spaces below.	Sta	ate	ZIP code			if filing jointly, want \$3
SACRAMEN	OTI				CZ	Ą	95833		•	this fund. Checking a ow will not change
Foreign country	name			Foreign province/state/o	coun	ty	Foreign postal of			or refund.
										You Spouse
Filing Status	; [	Single				Head of ho	usehold (HO	——. Н)		
Check only	_	Married filing jointly (even if only or	ne had	income)						
one box.		Married filing separately (MFS)				Qualifying	surviving spo	use (0	QSS)	
	lf y	you checked the MFS box, enter the	name o	of your spouse. If you	u che	ecked the HOH	or QSS box,	enter	the chil	d's name if the
	qι	ualifying person is a child but not you	ır depei	ndent:						
Digital	Δta	ny time during 2023, did you: (a) rece	aiva (as	a reward award or	navi	ment for proper	ty or services	s): or (	h) sall	
Digital Assets		nange, or otherwise dispose of a digi	•				•	,. ,	,	☐ Yes 🏻 No
Standard		neone can claim: You as a de		_ <u>_</u>			, (		,	
Deduction	_	Spouse itemizes on a separate return	•	•		•				
									1050	
		: Were born before January 2, 1	959 [	Are blind Spo	ouse	: U Was bori	n before Janu			☐ Is blind
Dependents	•	•		(2) Social security number	/	(3) Relationshi	P I.	tne bo: tax cre		fies for (see instructions): Credit for other dependents
If more	<u>``</u>	First name Last name			<u> </u>	to you	Crilla		uit	X
than four dependents,		THVIK S DASARI		982-96-923 982-96-925		Son		<u> </u>	-	<u> </u>
see instructions	S UA.	YASVI S DASARI		962-96-925	U	Daughter		<u> </u>		
and check here								<u> </u>		
-	1a	Total amount from Form(s) W-2, be	ov 1 (ec	e instructions)				Ш	1a	78,605.
Income	b	Household employee wages not re	•	•					1b	70,003.
Attach Form(s)	C	Tip income not reported on line 1a	•	` '					1c	
W-2 here. Also attach Forms	d	Medicaid waiver payments not rep	•	•					1d	
W-2G and	e	Taxable dependent care benefits f		( )					1e	-
1099-R if tax was withheld.	f	Employer-provided adoption bene		•					1f	-
If you did not	g g	Wages from Form 8919, line 6.			•				1g	-
get a Form	h	Other earned income (see instructi							1h	0.
W-2, see instructions.	i	Nontaxable combat pay election (s	,	ructions)		I 1i				
	z	Add lines 1a through 1h							1z	78,605.
Attach Sch. B	2a		2a	ĺ	b T	axable interest			2b	
if required.	За		3a			Ordinary dividen			3b	
	4a	·	4a			axable amount			4b	
Standard Deduction for—	5a	Pensions and annuities	5a		b T	axable amount			5b	
Single or	6a	Social security benefits	6a		<b>b</b> T	axable amount			6b	
Married filing separately,	С	If you elect to use the lump-sum e	lection	method, check here	(see	instructions)				
\$13,850	7	Capital gain or (loss). Attach Scheo	dule D i	f required. If not requ	uired	, check here			7	-4.
Married filing jointly or	8	Additional income from Schedule	1, line 1	0					8	-15,317.
Qualifying surviving spouse,	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,	, and 8.	This is your total inc	com	e			9	63,284.
\$27,700	10	Adjustments to income from Sche	dule 1,	line 26					10	
Head of household,	11	Subtract line 10 from line 9. This is	s your <b>a</b>	djusted gross incon	ne				11	63,284.
\$20,800 If you checked r	12	Standard deduction or itemized	deduct	tions (from Schedule	A)				12	27,700.
any box under	13	Qualified business income deducti	ion fron	n Form 8995 or Form	899	95-A			13	
Standard Deduction,	14								14	· ·
see instructions.	15	Subtract line 1/1 from line 11. If zer	o or los	s ontor O This is v	Our.	tavable incom	^		15	35 584

Form 1040 (2023	3)							Page <b>2</b>
Tax and	16	Tax (see instructions). Check if any from For	m(s): <b>1</b> 881	4 <b>2</b> 4972	3 🗌		16	3,829.
Credits	17	Amount from Schedule 2, line 3					17	
	18	Add lines 16 and 17					18	3,829.
	19	Child tax credit or credit for other depende	nts from Sched	ule 8812			19	1,000.
	20	Amount from Schedule 3, line 8					20	200.
	21	Add lines 19 and 20					21	1,200.
	22	Subtract line 21 from line 18. If zero or less	s, enter -0				22	2,629.
	23	Other taxes, including self-employment tax					23	0.
	24	Add lines 22 and 23. This is your total tax					24	2,629.
Payments	25	Federal income tax withheld from:						
•	а	Form(s) W-2			25a	1,174		
	b	Form(s) 1099			25b			
	С	Other forms (see instructions)			25c			
	d	Add lines 25a through 25c					25d	1,174.
If you have a	26	2023 estimated tax payments and amount	applied from 20	022 return			26	
qualifying child,	27	Earned income credit (EIC)		No .	27			
attach Sch. EIC.	28	Additional child tax credit from Schedule 88			28			
	29	American opportunity credit from Form 886	63, line 8		29			
	30	Reserved for future use			30			
	31	Amount from Schedule 3, line 15			31			
	32	Add lines 27, 28, 29, and 31. These are you	ur total other p	ayments and refu	ındable credit	s	32	
	33	Add lines 25d, 26, and 32. These are your	total payments				33	1,174.
Refund	34	If line 33 is more than line 24, subtract line	24 from line 33	. This is the amour	nt you <b>overpai</b> d	t	34	
	35a	Amount of line 34 you want refunded to yo	35a					
Direct deposit?	b	Routing number X X X X X X X X X	X X X	<b>c</b> Type:	Checking [	Savings	,	
See instructions.	d	Account number X X X X X X X X	X X X	X X X X X	XX			
	36	Amount of line 34 you want applied to you	r 2024 estimate	ed tax	36			
Amount	37	Subtract line 33 from line 24. This is the an	nount you owe					
You Owe		For details on how to pay, go to www.irs.go	•				37	1,516.
	38	Estimated tax penalty (see instructions) .			38	61		
<b>Third Party</b>		you want to allow another person to dis	scuss this retu	rn with the IRS?	_			
Designee	ins	structions			. Yes.	Complete	below.	<b>⋉</b> No
		signee's me	Phone no.			rsonal ider mber (PIN)	itification	
<u>C:</u>		der penalties of perjury, I declare that I have examin		accompanying sche			the heet	of my knowledge and
Sign		lief, they are true, correct, and complete. Declaration						, ,
Here	Yo	ur signature	Date	Your occupation		l If t	he IRS se	nt vou an Identity
		<del>g</del>						IN, enter it here
Joint return?				SOFTWARE E		(se	e inst.)	
See instructions. Keep a copy for	Sp	ouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupati	on			nt your spouse an ection PIN, enter it here
your records.		HOME MAKER					e inst.)	ection Pilv, enter it here
	——Ph	one no. (916)296-6347	Email address	DASARIJAYARA		COM .		
		eparer's name Preparer's sign		DIDIMITORIAM	Date	PTIN		Check if:
Paid		M PRIYA RAM SAGAR GUPTA SYAM PRI	YA RAM SAG	GAR GUPTA	03/24/2024	4 P020	82703	Self-employed
Preparer		m's name GLOBAL TAXES LLC			1,72, 22, 202			(678)965-9522
Use Only		m's address 245 ROONEY CT E BR	UNSWICK N	J 08816			m's EIN	(0.0,000 )000
<u> </u>	/⊏	40404				1		- 1010 (

# SCHEDULE 1 (Form 1040)

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

OMB No. 1545-0074

2023
Attachment Sequence No. 01

Your social security number

Department of the Treasury Internal Revenue Service

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

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

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

JAYA	AYARAMUDU DASARI & SANDHYA RANI GUMMANOOR 710-5				
Par	t I Additional Income				
1	Taxable refunds, credits, or offsets of state and local income taxes		1		
2a	Alimony received			3	
b	Date of original divorce or separation agreement (see instructions):				
3	Business income or (loss). Attach Schedule C		3		
4	Other gains or (losses). Attach Form 4797		4		
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Atta	ach Schedule	E . 5	-	-15,317.
6	Farm income or (loss). Attach Schedule F		6		
7	Unemployment compensation		7		
8	Other income:				
а	Net operating loss	8a (	)		
b	Gambling	8b			
С	Cancellation of debt	8c			
d	Foreign earned income exclusion from Form 2555	8d (	)		
е	Income from Form 8853	8e			
f	Income from Form 8889	8f			
g	Alaska Permanent Fund dividends	8g			
h	Jury duty pay	8h			
İ	Prizes and awards	8i			
j	Activity not engaged in for profit income	8j			
	Stock options	8k			
I	Income from the rental of personal property if you engaged in the rental				
	for profit but were not in the business of renting such property	81			
m	Olympic and Paralympic medals and USOC prize money (see				
	instructions)	8m			
n	Section 951(a) inclusion (see instructions)	8n			
0	Section 951A(a) inclusion (see instructions)	80			
p	Section 461(I) excess business loss adjustment	8p 8q			
q r	Scholarship and fellowship grants not reported on Form W-2	8r			
S	Nontaxable amount of Medicaid waiver payments included on Form	OI .			
3	1040, line 1a or 1d	8s (	)		
t	Pension or annuity from a nonqualifed deferred compensation plan or				
	a nongovernmental section 457 plan	8t			
u	Wages earned while incarcerated	8u			
Z	Other income. List type and amount:				
		8z			
9	Total other income. Add lines 8a through 8z		9		

-15,317.

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

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

# SCHEDULE 3 (Form 1040)

Department of the Treasury Internal Revenue Service

# **Additional Credits and Payments**

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

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

OMB No. 1545-0074

2023

Attachment
Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR JAYARAMUDU DASARI & SANDHYA RANI GUMMANOOR

Your social security number 710-54-9042

Par	t Nonrefundable Credits			
1	Foreign tax credit. Attach Form 1116 if required		1	
2	Credit for child and dependent care expenses from Form 2441 Form 2441	line 11. Attach	2	
3	Education credits from Form 8863, line 19		3	
4	Retirement savings contributions credit. Attach Form 8880		4	200.
5a	Residential clean energy credit from Form 5695, line 15		5a	
b	Energy efficient home improvement credit from Form 5695, line 32		5b	
6	Other nonrefundable credits:			
а	General business credit. Attach Form 3800	6a		
b	Credit for prior year minimum tax. Attach Form 8801	6b		
С	Adoption credit. Attach Form 8839	6c		
d	Credit for the elderly or disabled. Attach Schedule R	6d		
е	Reserved for future use	6e		
f	Clean vehicle credit. Attach Form 8936	6f		
g	Mortgage interest credit. Attach Form 8396	6g		
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h		
i	Qualified electric vehicle credit. Attach Form 8834	6i		
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j		
k	Credit to holders of tax credit bonds. Attach Form 8912	6k		
ı	Amount on Form 8978, line 14. See instructions	61		
m	Credit for previously owned clean vehicles. Attach Form 8936 .	6m		
z	Other nonrefundable credits. List type and amount:			
		6z		
7	Total other nonrefundable credits. Add lines 6a through 6z		7	
8	Add lines 1 through 4, 5a, 5b, and 7. Enter here and on Form 10	40, 1040-SR, or		
	1040-NR, line 20		8	200.
		(C	ontinue	d on page 2)

Schedule 3 (Form 1040) 2023 Page **2** 

Par	t II Other Payments and Refundable Credits			
9	Net premium tax credit. Attach Form 8962		9	
10	Amount paid with request for extension to file (see instructions) .		10	
11	Excess social security and tier 1 RRTA tax withheld	11		
12	Credit for federal tax on fuels. Attach Form 4136		12	
13	Other payments or refundable credits:			
а	Form 2439	13a		
b	Credit for repayment of amounts included in income from earlier years	13b		
С	Elective payment election amount from Form 3800, Part III, line 6, column (i)	13c		
d	Deferred amount of net 965 tax liability (see instructions)	13d		
Z	Other payments or refundable credits. List type and amount:	13z		
14	Total other payments or refundable credits. Add lines 13a through	13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040 line 31		15	

#### SCHEDULE D (Form 1040)

Department of the Treasury

# **Capital Gains and Losses**

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

Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

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

OMB No. 1545-0074

2023

Attachment Sequence No. **12** 

IIILEIIIA	in Nevertue Service	or motraotiono ana	and lateot innormat			
,	s) shown on return /ARAMUDU DASARI & SANDHYA RANI GUMMANOO:	R				ecurity number
_	ou dispose of any investment(s) in a qualified opportunity es," attach Form 8949 and see its instructions for additiona	_	-	_		
Par					e ins	tructions)
lines This	nstructions for how to figure the amounts to enter on the below.  form may be easier to complete if you round off cents to e dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustmen to gain or loss Form(s) 8949, line 2, colum	from Part I,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
	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					
	Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked	96.	100.			-4.
3	Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked					
5	Short-term gain from Form 6252 and short-term gain or (loss) from partnerships, Schedule(s) K-1	S corporations,	estates, and tr	usts from	5	
	Short-term capital loss carryover. Enter the amount, if an <b>Worksheet</b> in the instructions				6	( )
7	Net short-term capital gain or (loss). Combine lines 1a term capital gains or losses, go to Part II below. Otherwise			e any long-	7	-4.
Par	Long-Term Capital Gains and Losses—Ger	nerally Assets F	leld More Than	One Year	(see i	instructions)
lines This	nstructions for how to figure the amounts to enter on the below.  form may be easier to complete if you round off cents to e dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustmen to gain or loss Form(s) 8949, line 2, colum	from 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.					
	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					
	Gain from Form 4797, Part I; long-term gain from Forms from Forms 4684, 6781, and 8824				11	
12	Net long-term gain or (loss) from partnerships, S corporat Capital gain distributions. See the instructions	ions, estates, and	trusts from Scheo	dule(s) K-1	12 13	
	Long-term capital loss carryover. Enter the amount, if any		our <b>Capital Loss</b>	Carryover	14	( )
15	Net long-term capital gain or (loss). Combine lines 8a					,

15

Schedule D (Form 1040) 2023 Page 2

### Part III **Summary** 16 Combine lines 7 and 15 and enter the result 16 -4. • 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 4. ) 21 • (\$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

File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D. Go to www.irs.gov/Form8949 for instructions and the latest information.

OMB No. 1545-0074 Attachment

Sequence No. 12A

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

Social security number or taxpayer identification number

710-54-9042

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.

JAYARAMUDU DASARI & SANDHYA RANI GUMMANOOR 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 Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see Part I instructions). For long-term transactions, see page 2. Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions). You must check Box A. B. or C below. Check only one box. If more than one box applies for your short-term transactions. complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need. (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above) 🗵 (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 If you enter an amount in column (a). (h) enter a code in column (f). Cost or other basis Gain or (loss) (d) (c) (a) (b) Date sold or Proceeds See the **Note** below See the separate instructions. Subtract column (e) Description of property Date acquired (sales price) from column (d) and disposed of and see Column (e) (Example: 100 sh. XYZ Co.) (Mo., day, yr.) combine the result (Mo., day, yr.) (see instructions) in the separate (g) Code(s) from Amount of adjustment instructions. with column (g). instructions

Robinhood Crypto LLC 01/01/23 12/31/23 96. 100. -4.2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B 96. 100. above is checked), or line 3 (if Box C above is checked) . -4.

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

#### **SCHEDULE E** (Form 1040)

### **Supplemental Income and Loss**

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

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

Department of the Treasury Internal Revenue Service

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

Attachment Sequence No. 13

OMB No. 1545-0074

Name(s	) shown on return						Y	our social s	ecurity n	umber
JAYA	ARAMUDU DASARI & SA	ANDHYA RANI GUMMANOOR						710-54-	9042	
Part	<b>Note:</b> If you are in the rental income or loss for	From Rental Real Estate and business of renting personal proper rom Form 4835 on page 2, line 40.	ty, use	Schedule						
		s in 2023 that would require you								
B	f "Yes," did you or will you	file required Form(s) 1099? .							☐ Yes	s 🗌 No
1a	Physical address of each	n property (street, city, state, ZIF	ode	e)						
A	-	HYDERABAD TELANGANA I								
B	OPPERGODA, KONEDA	HIDERABAD IELANGANA I	-11 5	71711						
C										
	Type of Droporty 0 F	or and rental real estate prope	why lied	had		Го	ir Rental	Personal	Llaa	
ID		or each rental real estate prope bove, report the number of fair				га	Days	Personal		QJV
A		ersonal use days. Check the Qu			Α		365	Dayo	0	
B	if	you meet the requirements to f	ile as	a	В		303		0	
C		ualified joint venture. See instru	ictions	S.	C					
	of Property:									
	Single Family Residence	3 Vacation/Short-Term Ren	tal	5 Lanc	1	7	Self-Rental			
	Multi-Family Residence	4 Commercial	lai	6 Roya				) )		
	Wulli-Family nesidence	4 Commercial		O HOya	aities	0	Other (describ	·		
							Properties	S:		
Incom					Α		В			С
3			3		4	20.				
4	Royalties received		4							
Exper	ises:									
5	Advertising		5							
6	Auto and travel (see instru	uctions)	6							
7		e	7		2,4	12.				
8	Commissions		8							
9	Insurance		9							
10		nal fees	10							
11	_		11		1,4	55.				
12		banks, etc. (see instructions)	12							
13	Other interest		13							
14	Repairs		14			76.				
15	Supplies		15		3,4	17.				
16			16							
17			17		2,1					
18		depletion	18		3,5	56.				
19	Other (list)		19							
20		5 5 through 19	20		15,7	37.				
21		3 (rents) and/or 4 (royalties). If								
	, , ,	uctions to find out if you must			1 - 2	1 7				
			21		-15,3	1/.				
22		ate loss after limitation, if any,		,	1 - 01	_ \	,			
00	,	ctions)	22	(	15,31		(	100		
23a	· ·	ted on line 3 for all rental prope				23a		420.		
b		ted on line 4 for all royalty properties	erties		•	23b				
C	· ·	ted on line 12 for all properties			•	23c		E E G		
d	· ·	ted on line 18 for all properties			•	23d		556.		
e	· ·	ted on line 20 for all properties				23e	15,	737.		
24	•	ounts shown on line 21. Do not		-				24		F 215
25	• •	from line 21 and rental real estate						25 (	1	5,317.
26		and royalty income or (loss). ( /, and line 40 on page 2 do no								
		ine 5. Otherwise, include this ar						26		15,317.
		, in loid do tillo di								,,

#### **SCHEDULE 8812** (Form 1040)

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

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

OMB No. 1545-0074

Attachment Sequence No. 47

Department of the Treasury Internal Revenue Service

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

Name(s) shown on return Your social security number 710-54-9042 JAYARAMUDU DASARI & SANDHYA RANI GUMMANOOR 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 63,284. Enter income from Puerto Rico that you excluded . . . . . 2a Enter the amounts from lines 45 and 50 of your Form 2555 . . . b 2b 0 c Enter the amount from line 15 of your Form 4563 . . . . Add lines 2a through 2c . . . . . . . . . . . . . . . . 2d3 3 63,284. 4 Number of qualifying children under age 17 with the required social security number 0 5 5 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 . . . . . . . . . . . . Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4. 7 7 1,000. Add lines 5 and 7 . . . . . . . . 8 8 1,000. Enter the amount shown below for your filing status. • Married filing jointly—\$400,000 • All other filing statuses—\$200,000 9 400,000. Subtract line 9 from line 3. 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 11 0. Is the amount on line 8 more than the amount on line 11? . . . 12 1,000. No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. **X** Yes. Subtract line 11 from line 8. Enter the result. 13 Enter the amount from Credit Limit Worksheet A 13 3,629. Enter the smaller of line 12 or line 13. This is your child tax credit and credit for other dependents 1,000. 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 additional child tax credit on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27

BAA

Schedule 8812 (Form 1040) 2023

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 line	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 \$1,600.							
	Enter the result. If zero, stop here; 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	20						
	<b>Next.</b> On line 16b, is the amount \$4,800 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.							
Part	II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Resident	s of F	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, or							
	if you are a bona fide resident of Puerto Rico, 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 larger of line 20 or line 25	26						
-0	Next, enter the smaller of line 17 or 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						
	, , , , , , , , , , , , , , , , , , , ,							

# Form **8889**

Department of the Treasury

Internal Revenue Service

**Health Savings Accounts (HSAs)** 

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

Go to www.irs.gov/Form8889 for instructions and the latest information.

OMB No. 1545-0074

2023
Attachment
Sequence No. 52

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

JAYARAMUDU DASARI

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions. 710-54-9042

Before you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required. HSA Contributions and Deduction. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse. Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2023. ☐ Self-only X Family HSA contributions you made for 2023 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2023. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions . . . . . . . . . . . . . . . 2 0. If you were under age 55 at the end of 2023 and, on the first day of every month during 2023, you 3 were, or were considered, an eligible individual with the same coverage, enter \$3,850 (\$7,750 for 3 7,750. Enter the amount you and your employer contributed to your Archer MSAs for 2023 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2023, also 4 0. 5 5 7,750. 6 Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2023, see the instructions for the amount to enter . . . 6 7,750. If you were age 55 or older at the end of 2023, married, and you or your spouse had family coverage 7 under an HDHP at any time during 2023, enter your additional contribution amount. See instructions . 7 7,750. 8 8 9 Employer contributions made to your HSAs for 2023 . . . . . . . . . 10 3,988. 11 11 12 12 3,762. HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13 13 13 0. Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions. HSA Distributions. If you are filing jointly and both you and your spouse each have separate HSAs, complete Part II a separate Part II for each spouse. 14a 382. Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were 14b 14c 382. Qualified medical expenses paid using HSA distributions (see instructions) . . . . . . . . . . . . 15 15 382. Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this 16 16 0. If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form Income and Additional Tax for Failure To Maintain HDHP Coverage. See the instructions before Part III completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse. 18 18 19 19 20 Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f . 20 Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 21

21

# Form **8880**

## **Credit for Qualified Retirement Savings Contributions**

Department of the Treasury Internal Revenue Service

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

Go to www.irs.gov/Form8880 for the latest information.

OMB No. 1545-0074

2023

Attachment
Sequence No. 54

Name(s) shown on return

Your social security number 710-54-9042



You cannot take this credit if either of the following applies.

JAYARAMUDU DASARI & SANDHYA RANI GUMMANOOR

- The amount on Form 1040, 1040-SR, or 1040-NR, line 11, is more than \$36,500 (\$54,750 if head of household; \$73,000 if married filing jointly).
- The person(s) who made the qualified contribution or elective deferral (a) was born after January 1, 2006; (b) is claimed as a dependent on someone else's 2023 tax return; or (c) was a **student** (see instructions).

						- 1	(a) Va		I/h) Va	r challe
raditional an	d Roth IRA co	ontributions, and ABI	LE account contribu	itions by the			(a) You		(D) TOU	r spous
		23. <b>Do not</b> include ro			1					
		) or other qualified er								
ontributions,	stributions, and 501(c)(18)(D) plan contributions for 2023 (see instructions) 2			4,2	37.					
					3		4,2	37.		
		ed after 2020 and		,						
		return (see instruction			_					
		oth columns. See instr			4		4 0			
		zero or less, enter -0-			5		4,2			
		naller of line 5 or \$2,00			6		2,0	00. <b>7</b>		0 000
		zero, <b>stop</b> ; you can't		1			+	1		2,000
		1040, 1040-SR, or 10		8		63,	284.			
inter the appi	icable decimal	amount from the table	e below.							
If line	8 is-	Δ	and your filing status	: is_						
	0.0		and your mining otatue	, 10		I				
		Married	Head of	Single, Marr	ied filii	ng				
Over-	But not over—			Single, Marr separate	ly, or					
	But not	Married	Head of household	Single, Marr	ly, or					
	But not	Married filing jointly	Head of household	Single, Marr separate	ly, or ving sp					
Over-	But not over—	Married filing jointly <b>Enter on</b> 0.5 0.5	Head of household	Single, Marr separate Qualifying survi	ly, or ving sp					
Over—	But not over— \$21,750	Married filing jointly <b>Enter on</b> 0.5	Head of household line 9—	Single, Marr separate Qualifying survi 0.5	ly, or ving sp			9	X	.1
Over— \$21,750	But not over— \$21,750 \$23,750	Married filing jointly <b>Enter on</b> 0.5 0.5	Head of household line 9—  0.5 0.5	Single, Marr separate Qualifying survi 0.5 0.2	ly, or ving sp			9	x	.1
Over— \$21,750 \$23,750	But not over— \$21,750 \$23,750 \$32,625	Married filing jointly Enter on 0.5 0.5 0.5	Head of household  line 9—  0.5  0.5  0.5	Single, Marr separate Qualifying survi 0.5 0.2	ly, or ving sp			9	×	.1
Over— \$21,750 \$23,750 \$32,625	But not over— \$21,750 \$23,750 \$32,625 \$35,625	Married filing jointly Enter on 0.5 0.5 0.5 0.5	Head of household  line 9—  0.5  0.5  0.5  0.5	Single, Marr separate Qualifying survi 0.5 0.2 0.1 0.1	ly, or ving sp			9	x	.1
Over— \$21,750 \$23,750 \$32,625 \$35,625	But not over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500	Married filing jointly Enter on 0.5 0.5 0.5 0.5 0.5 0.5	Head of household  line 9—  0.5  0.5  0.5  0.2  0.1	Single, Marr separate Qualifying survi 0.5 0.2 0.1 0.1	ly, or ving sp			9	×	. 1
Over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500	But not over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500	Married filing jointly Enter on 0.5 0.5 0.5 0.5 0.5 0.5 0.5	Head of household line 9—  0.5 0.5 0.5 0.5 0.1 0.1	Single, Marr separate Qualifying survi 0.5 0.2 0.1 0.1 0.1 0.0	ly, or ving sp			9	×	.1
Over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500	But not over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500	Married filing jointly  Enter on  0.5  0.5  0.5  0.5  0.5  0.5  0.5  0.	Head of household line 9—  0.5 0.5 0.5 0.5 0.1 0.1 0.1	Single, Marr separate Qualifying survi 0.5 0.2 0.1 0.1 0.0 0.0	ly, or ving sp		·	9	×	.1
Over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500	But not over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500 \$54,750	Married filing jointly <b>Enter on</b> 0.5  0.5  0.5  0.5  0.5  0.5  0.5  0.	Head of household line 9—  0.5 0.5 0.5 0.2 0.1 0.1 0.1 0.1	Single, Marr separate Qualifying survi 0.5 0.2 0.1 0.1 0.0 0.0 0.0	ly, or ving sp			9	x	.1
Over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500 \$54,750	But not over— \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500 \$54,750 \$73,000	Married filing jointly <b>Enter on</b> 0.5  0.5  0.5  0.5  0.5  0.5  0.1  0.1	Head of household  line 9—  0.5 0.5 0.5 0.2 0.1 0.1 0.1 0.1 0.0 0.0	Single, Marr separate Qualifying survi 0.5 0.2 0.1 0.1 0.0 0.0 0.0 0.0 0.0	ly, or ving sp			9	x	
S21,750 \$23,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500 \$54,750 \$73,000	But not over—  \$21,750 \$23,750 \$32,625 \$35,625 \$36,500 \$43,500 \$47,500 \$54,750 \$73,000  Note: I	Married filing jointly <b>Enter on</b> 0.5  0.5  0.5  0.5  0.5  0.5  0.1  0.1	Head of household  Iine 9—  0.5 0.5 0.5 0.2 0.1 0.1 0.1 0.1 0.0 0.0 /ou can't take this cre	Single, Marry separate Qualifying survivation 0.5 0.2 0.1 0.1 0.1 0.0 0.0 0.0 0.0 0.0 0.0 0.0	ly, or ving sp	oouse		9	x	.1

<sup>\*</sup> See Pub. 590-A for the amount to enter if you claim any exclusion or deduction for foreign earned income, foreign housing, or income from Puerto Rico or for bona fide residents of American Samoa.

REV 03/07/24 PRO

200.

and on Schedule 3 (Form 1040), line 4

(Rev. November 2023)

Department of the Treasury Internal Revenue Service

Taxpayer name(s) shown on return

Paid Preparer's Due Diligence Checklist

Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC),
Child Tax Credit (CTC) (including the Additional Child Tax Credit (ACTC) and
Credit for Other Dependents (ODC)), and Head of Household (HOH) Filing Status

To be completed by preparer and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS. Go to www.irs.gov/Form8867 for instructions and the latest information.

OMB No. 1545-0074 For tax year 20 23 Attachment

Sequence No. 70

Taxpayer identification number

JAY	ARAMUDU DASARI & SANDHYA RANI GUMMANOOR	710-54-9042	2		
Preparer's name Preparer tax identifie			tion numl	oer	
SYAI	M PRIYA RAM SAGAR GUPTA	P02082703			
Part	·				
	check the appropriate box for the credit(s) and/or HOH filing status claimed on the returbenefit(s) claimed (check all that apply). $\square$ EIC $\square$ CTC/ACT		the rel		arts I-V HOH
1	Did you complete the return based on information for the applicable tax year provided by the taxpayer			No	N/A
	or reasonably obtained by you?	X			
2	If credits are claimed on the return, did you complete the applicable EIC and/or CT worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Schedu 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instructions worksheet(s) that provides the same information, and all related forms and schedules to claimed?	ule 8812 (Form , or your own	×		
3	Did you satisfy the knowledge requirement? To meet the knowledge requirement, you meet the following.	ust do both of			
	• Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's determine that the taxpayer is eligible to claim the credit(s) and/or HOH filling status.	s responses to			
	• Review information to determine that the taxpayer is eligible to claim the credit(s) and status and to figure the amount(s) of any credit(s)		X		
4	Did any information provided by the taxpayer or a third party for use in preparing information reasonably known to you, appear to be incorrect, incomplete, or inconsist answer questions 4a and 4b. If " <b>No</b> ," go to question 5.)	ent? (If "Yes,"		×	
а	Did you make reasonable inquiries to determine the correct, complete, and consistent info	ormation? .			
b	Did you contemporaneously document your inquiries? (Documentation should include you asked, whom you asked, when you asked, the information that was provided, and information had on your preparation of the return.)	the impact the			
5	Did you satisfy the record retention requirement? To meet the record retention requirement keep a copy of your documentation referenced in question 4b, a copy of this Form 8867, applicable worksheet(s), a record of how, when, and from whom the information used to 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) processes that you relied on to determine eligibility for the credit(s) and/or HOH filing states the amount(s) of the credit(s)	, a copy of any prepare Form rovided by the tus or to figure	×		
	List those documents provided by the taxpayer, if any, that you relied on:				
6	Did you ask the taxpayer whether he/she could provide documentation to substantiate e credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return is selected for audit?		×		
7	Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous	year?	×		
	(If credits were disallowed or reduced, go to question 7a; if not, go to question 8.)				
а	Did you complete the required recertification Form 8862?				
8	If the taxpayer is reporting self-employment income, did you ask questions to prepare a correct Schedule C (Form 1040)?	complete and			

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Part	Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go	to Part	III.)	
9a		Yes	No	N/A
	claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC			
	and does not have a qualifying child, go to question 10.)			
b	Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer has supported the child the entire year?			
_	has supported the child the entire year?			
C	more than one person (tiebreaker rules)?			
Part		claim C	TC, A	CTC.
	or ODC, go to Part IV.)		•	,
10	Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is	Yes	No	N/A
	a citizen, national, or resident of the United States?	×		
1	Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with			
	the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's			
	custodial parent has released a claim to exemption for the child?	×		
12	Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or			
	separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return?	×		
Part			 Part \	/\
13	Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qu		Yes	No
	tuition and related expenses for the claimed AOTC?			П
Part	Due Diligence Questions for Claiming HOH (If the return does not claim HOH filing statu	s, go to	D Part	VI.)
14	Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax	x year	Yes	No
	and provided more than half of the cost of keeping up a home for the year for a qualifying person?			
Part	VI Eligibility Certification			
	You will have complied with all due diligence requirements for claiming the applicable credit(s) and on the return of the taxpayer identified above if you:	or HO	H filing	status
	<ul> <li>A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's respo in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit( status and to figure the amount(s) of the credit(s);</li> </ul>	nses on s) and/c	the ref or HOH	turn or filing
	<ul> <li>B. Complete this Form 8867 truthfully and accurately and complete the actions described in this check credit(s) claimed and HOH filing status, if claimed;</li> </ul>	ist for a	ny app	licable
	C. Submit Form 8867 in the manner required; and			
	D. Keep all five of the following records for 3 years from the latest of the dates specified in the Form 88 Document Retention.	67 instr	uctions	under
	1. A copy of this Form 8867.			
	2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.			
	3. Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).	"s eligib	ility for	the
	<ol><li>A record of how, when, and from whom the information used to prepare this form and the applica obtained.</li></ol>	ble worl	ksheet(	s) was
	<ol><li>A record of any additional information you relied upon, including questions you asked and the tax determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount</li></ol>	payer's unt(s) of	respon the cre	ses, to edit(s).
	If you have not complied with all due diligence requirements, you may have to pay a penalty for each related to a claim of an applicable credit or HOH filing status (see instructions for more information	h failur ).	e to co	mply
15	Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct	t. and	Yes	No
	complete?		×	