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

| | <u> </u> | | - | | | |
|---|---|---|--|---|--|--|
| Submission Identific | ation Number (SID) | | | | | |
| Taxpayer's name | Social security number | | | | | |
| BHAVANI SAI N | 446-41-5460 | | | | | |
| Spouse's name | | | Spouse's social security number | | | |
| Part I Tax Re | eturn Information — Tax Year Ending December 31, 2023 (Enter | year you ar | e authorizin | ig.) | | |
| | only on lines 1 through 5. | <i>y y</i> | | <u> </u> | | |
| | S filers use line 4 only. Leave lines 1, 2, 3, and 5 blank. | | | | | |
| 1 Adjusted gros | ss income | | 1 | 4,998. | | |
| | | | 2 | 0. | | |
| 3 Federal incon | ne tax withheld from Form(s) W-2 and Form(s) 1099 | | 3 | | | |
| • | want refunded to you | | 4 | | | |
| | owe | | 5 | 0. | | |
| | yer Declaration and Signature Authorization (Be sure you get and k ury, I declare that I have examined a copy of the income tax return (original or amended) | | | | | |
| to send my return to the for any delay in process Agent to initiate an AC payment of my federal authorization is to rempayment, I must contabusiness days prior to taxes to receive confict | nded) I am now authorizing. I consent to allow my intermediate service provider, transmine IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejecting the return or refund, and (c) the date of any refund. If applicable, I authorize the U. Helectronic funds withdrawal (direct debit) entry to the financial institution account indicates owed on this return and/or a payment of estimated tax, and the financial institution in full force and effect until I notify the U.S. Treasury Financial Agent to terminate act the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requested the payment (settlement) date. I also authorize the financial institutions involved in the dential information necessary to answer inquiries and resolve issues related to the pumber (PIN) below is my signature for the income tax return (original or amended) I and drawal Consent. | ction of the tra S. Treasury are cated in the ta n to debit the the authoriza ests must be processing of ayment. I furth | ansmission, (b) nd its designate x preparation and entry to this action. To revok received no lethe electronic ner acknowled | the reason ed Financial software for count. This e (cancel) a later than 2 payment of lge that the | | |
| Taxpayer's PIN: che | | | | | | |
| | GLOBAL TAXES LLC to enter or generate r | ř Ent | 5 4 6 0 er five digits, bu 't enter all zero | d as my t | | |
| signature o | n the income tax return (original or amended) I am now authorizing. | | | | | |
| | my PIN as my signature on the income tax return (original or amended) I am no entering your own PIN and your return is filed using the Practitioner PIN method | | | | | |
| Your signature ► | Date ▶ | | | | | |
| | | | | | | |
| Spouse's PIN: chec | | B.1.1 | | | | |
| I authorize | ERO firm name to enter or generate r | , | er five digits, bu | as my | | |
| signature o | n the income tax return (original or amended) I am now authorizing. | | i't enter all zero | | | |
| ☐ I will enter i | my PIN as my signature on the income tax return (original or amended) I am no entering your own PIN and your return is filed using the Practitioner PIN method | | | | | |
| Spouse's signature | Date ► | | | | | |
| | Practitioner PIN Method Returns Only—continue below | | | | | |
| Part III Certific | cation and Authentication — Practitioner PIN Method Only | | | | | |
| ERO's EFIN/PIN. Er | nter your six-digit EFIN followed by your five-digit self-selected PIN. 2 2 | 2 4 9 0 | 6 0 8 2 er all zeros | 7 1 | | |
| authorized to file for ta | e numeric entry is my PIN, which is my signature for the electronic individual income ta ax year indicated above for the taxpayer(s) indicated above. I confirm that I am submit actitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of In | tting this retu | rn in accordar | ce with the | | |
| ERO's signature ▶ | Date ► | | | | | |
| | ERO Must Retain This Form — See Instructions | | | | | |

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

Department of the Treasury – Internal Revenue Service U.S. Nonresident Alien Income Tax Return 2023 OMB No. 1545-0074

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

| For the year Jar | า. 1–🏻 | ec. 31, 2023, or other tax year beginr | ning | , 2023, | ending | , 2 | 0 | See separate instructions. |
|------------------------------------|---|--|------------|---------------------------------|-------------------------|-----------|---------------|----------------------------|
| Your first name and middle initial | | Last name Y | | | Your identifying number | | | |
| | (5 | | | (see instructions) | | | | |
| BHAVANI S | SAI | NIKHIL | KOTT | E | | | 446-4 | 1-5460 |
| Home address | (numl | per and street). If you have a P.O. box | , see ins | tructions. | | ' | | Apt. no. |
| 4104 JUBI | LEE | DR | | | | | | |
| City, town, or p | ost of | fice. If you have a foreign address, al | so comp | lete spaces below. | 1 | State | ZI | P code |
| MCKINNEY | | | | | | TX | 7. | 5070 |
| Foreign country | nam nam | e | Foreign | n province/state/county | 1 | oreign po | stal code | |
| | | | | | | | | |
| Filing | | Single | arately (N | MFS) Qualifyii | ng surviving spouse (C | (SS) | ☐ Estat | e 🗌 Trust |
| Status | | • | | | 0 , , | , | | |
| Check only | If you checked the QSS box, enter the child's name if the qualifying person is a child but not your depende | | | | | | | |
| one box. | ^+ - | | : (| | | .: | (la.) a a ll | -1 |
| Digital Assets | | ny time during 2023, did you: (a) rece erwise dispose of a digital asset (or a | | | | | (D) Sell, exc | |
| Dependents | 1 | | | | | | | qualifies for (see inst.): |
| (see instructions) | | | | (2) Dependent's | | Child | tax credit | Credit for other |
| (, | | (1) First name Last name | | identifying number | (3) Relationship to you | Offina | - Idax Gredit | dependents |
| If more than four | | | | | | | | |
| dependents, see | | | | | | | | |
| instructions and check here | | | | | | | <u> </u> | |
| | 10 | Total amount from Form(s) W-2, box | . 1 (000) | not w rational | | | <u> </u> | 5,000. |
| Income | 1a | , | ` | , | | | 1a | 3,000. |
| Effectively | b | Household employee wages not rep Tip income not reported on line 1a (| | ` ' | | | 1b 1c | |
| Connected With U.S. | c d | Medicaid waiver payments not repo | | , | | | 1d | |
| Trade or | e | Taxable dependent care benefits from | | ` ' ` ` ` | , | | 1e | |
| Business | f | Employer-provided adoption benefit | | • | | | 1f | |
| Dusiness | g | Wages from Form 8919, line 6 | | · | | | 1g | |
| Attach | h | Other earned income (see instruction | | | | | 1h | |
| Form(s) W-2, 1042-S, | i | Reserved for future use | | | 1i | | | |
| SSA-1042-S, | j | Reserved for future use | | | | | 1j | |
| RRB-1042-S, and 8288-A | k | Total income exempt by a treaty from | m Sched | ule OI (Form 1040-NR), i | tem L, | | | |
| here. Also | | line 1(e) | | | 1k | | | |
| attach | z | Add lines 1a through 1h | | | | | 1z | 5,000. |
| Form(s) 1099-R if | 2a | Tax-exempt interest 2 | а | b Tax | cable interest | | 2b | |
| tax was | 3a | Qualified dividends 3 | а | | dinary dividends | | 3b | |
| withheld. | 4a | IRA distributions 4a | | | cable amount | | 4b | |
| If you did not get a Form | 5a | Pensions and annuities 5a | | | cable amount | | 5b | |
| W-2, see | 6 | Reserved for future use | | | | | 6 7 | |
| instructions. | 7 | Capital gain or (loss). Attach Schedule D (Form 1040) if required. If not required, check here | | | | | | -2. |
| | 8 | Additional income from Schedule 1 | | | | | 8 | 4 000 |
| | 9 | Add lines 1z, 2b, 3b, 4b, 5b, 7, and | | - | | | 9 | 4,998. |
| | 10 | | | | | | | |
| | 11 | | 10 | 4,998. | | | | |
| | 12 | , | | | | | | 4, 550. |
| | 12 | | | | | | | 13,850. |
| | deduction (see instructions) | | | | | · ·- | | |
| | | | | | | | | |
| | c | Add lines 13a and 13b | • . | ŕ | | | 13c | |
| | 14 | | | | | | 14 | 13,850. |
| | 15 | Subtract line 14 from line 11. If zero | or less, | enter -0 This is your ta | xable income | | 15 | 0. |

| Tax and | 16 | Tax (see instructions). Check if any from Fo | orm(s): 1 🗌 88 | 2 2 497 | 2 3 🗌 | 1 | 6 0. |
|-------------------|-----------|---|-----------------------|-----------------------|----------------------|------------------------------|-------------------------|
| Credits | 17 | Amount from Schedule 2 (Form 1040), lin | e3 | | | 1 | 7 0. |
| | 18 | Add lines 16 and 17 | | | | 1 | 8 0. |
| | 19 | Child tax credit or credit for other depend | lents from Sched | ule 8812 (Form 10 | 40) | 1 | 9 |
| | 20 | Amount from Schedule 3 (Form 1040), lin | e8 | | | 2 | 0 |
| | 21 | Add lines 19 and 20 | | | | 2 | 1 |
| | 22 | Subtract line 21 from line 18. If zero or les | ss, enter -0 | | | 2 | 2 0. |
| | 23a | Tax on income not effectively connected | | | | | |
| | | Schedule NEC (Form 1040-NR), line 15 | | | 23a | | |
| | b | Other taxes, including self-employment t line 21 | • | , | 23b | | |
| | С | Transportation tax (see instructions) . | | | 23c | | |
| | d | Add lines 23a through 23c | | | | 23 | 3d |
| | 24 | Add lines 22 and 23d. This is your total to | ax | | | 2 | 0. |
| Payments | 25 | Federal income tax withheld from: | | | | | |
| - | а | Form(s) W-2 | | | 25a | | |
| | b | Form(s) 1099 | | | 25b | | |
| | С | Other forms (see instructions) | | | 25c | | |
| | d | Add lines 25a through 25c | | | | 25 | id |
| | е | Form(s) 8805 | | | | 25 | 5e |
| | f | Form(s) 8288-A | | | | 25 | 5f |
| | g | Form(s) 1042-S | | | | | ig |
| | 26 | 2023 estimated tax payments and amour | | | | | |
| | 27 | Reserved for future use | | | 27 | | |
| | 28 | Additional child tax credit from Schedule | | | 28 | | |
| | 29 | Credit for amount paid with Form 1040-C | • | • | 29 | | |
| | 30 | Reserved for future use | | | 30 | | |
| | 31 | Amount from Schedule 3 (Form 1040), lin | | | 31 | | |
| | 32 | Add lines 28, 29, and 31. These are your | | | | 3 | 2 |
| | 33 | Add lines 25d, 25e, 25f, 25g, 26, and 32. | | | | | |
| Refund | 34 | If line 33 is more than line 24, subtract lin | | | | | 4 |
| neruna | 35a | Amount of line 34 you want refunded to | | | • | | 5a |
| Direct deposit? | b | Routing number X X X X X | | c Type: | | Savings | ,,, |
| See instructions. | d | Account number X X X X X X | | | | Oavings | |
| | | If you want your refund check mailed to | | | | 2000 1 | |
| | е | | | | | | |
| | 36 | enter it here. Amount of line 34 you want applied to yo | our 2024 actimat | ad tav | 36 | | |
| Amount | 37 | Subtract line 33 from line 24. This is the a | | | 00 | | |
| You Owe | 01 | For details on how to pay, go to www.irs. | = | | | 3 | 7 0. |
| Tou Owe | 38 | Estimated tax penalty (see instructions) | - | | 38 | | 0. |
| Third | | u want to allow another person to discuss | | | | s. Complete | below. X No |
| Party | , | ' | | | | | |
| Designee | Designame | | Phone no. | | | nal identificati er (PIN) | on |
| 200.9.100 | Under | penalties of perjury, I declare that I have examin | ed this return and a | | les and statements | s, and to the be | |
| <u>.</u> . | belief, | they are true, correct, and complete. Declaration | of preparer (other t | han taxpayer) is base | ed on all informatio | n of which prep | arer has any knowledge. |
| Sign | Yours | signature | Date | Your occupation | | I | S sent you an Identity |
| Here | | | | | | | on PIN, enter it here |
| | | | | SOFTWARE E | NGINEER | (see inst |) |
| | Phone | | Email address | | Data | DTIN | |
| Paid | • | | r's signature | | Date | PTIN | Check if: |
| Preparer | | | PRIYA RAM | SAGAR GUPTA | 03/21/2024 | P0208270 | _ |
| Use Only | | name GLOBAL TAXES LLC | | | | | (678) 965-9522 |
| - 55 Siny | Firm's | address 245 DOOMEV CT F D | DIMONTOW M | T 00016 | | Firm's FIN | |

Form 1040-NR (2023)

BAA

SCHEDULE NEC (Form 1040-NR)

Tax on Income Not Effectively Connected With a U.S. Trade or Business

Attachment

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service

Name shown on Form 1040-NR

Attach to Form 1040-NR. Go to www.irs.gov/Form1040NR for instructions and the latest information. Sequence No. 7B

Your identifying number

446-41-5460 BHAVANI SAI NIKHIL KOTTE Enter **amount of income** under the appropriate rate of tax. See instructions. (d) Other (specify) Nature of Income (a) 10% **(b)** 15% (c) 30% % % Dividends and dividend equivalents: Dividends paid by U.S. corporations 1a 1b Dividend equivalent payments received with respect to section 871(m) transactions 1c 2 Interest: 2a 2b 2c C 3 4 5 Real property income and natural resources royalties . . . 6 7 7 8 9 10 Gambling-Residents of Canada only. Enter net income in column (c). If zero or less, enter -0-. Winnings _____ 10c Losses Gambling-Residents of countries other than Canada. 11 Other (specify): 12 12 13 Add lines 1a through 12 in columns (a) through (d) 13 14 14 Tax on income not effectively connected with a U.S. trade or business. Add columns (a) through (d) of line 14. Enter the total here and on Form 1040-NR, line 23a 15 Capital Gains and Losses From Sales or Exchanges of Property Enter only the capital gains and 16 (a) Kind of property and description (f) LOSS (g) GAIN (b) Date acquired (c) Date sold (d) Sales price (e) Cost or losses from property sales or (if necessary, attach statement of If (e) is more than (d), If (d) is more than (e), mm/dd/yyyy mm/dd/yyyy other basis exchanges that are from sources descriptive details not shown below) subtract (d) from (e). subtract (e) from (d). within the United States and not effectively connected with a U.S. business. Do not include a gain or loss on disposing of a U.S. real property interest; report these gains and losses on Schedule D (Form 1040). Report property sales or exchanges that are effectively connected with a U.S. business 17 Add columns (f) and (g) of line 16 on Schedule D (Form 1040). 18 Capital gain. Combine columns (f) and (g) of line 17. Enter the net gain here and on line 9 above. If a loss, enter -0-18 Form 4797, or both.

SCHEDULE OI (Form 1040-NR)

Other Information

Attach to Form 1040-NR.

Go to www.irs.gov/Form1040NR for instructions and the latest information. Answer all questions.

OMB No. 1545-0074 Attachment Sequence No. 7C

Your identifying number

Department of the Treasury Internal Revenue Service

Name shown on Form 1040-NR

446-41-5460 BHAVANI SAI NIKHIL KOTTE Of what country or countries were you a citizen or national during the tax year? INDIA Α In what country did you claim residence for tax purposes during the tax year? India В С Have you ever applied to be a green card holder (lawful permanent resident) of the United States? Were you ever: X No Yes 1. A U.S. citizen? X No If you answer "Yes" to (1) or (2), see Pub. 519, chapter 4, for expatriation rules that apply to you. Ε If you had a visa on the last day of the tax year, enter your visa type. If you didn't have a visa, enter your U.S. immigration status on the last day of the tax year. F1 X No F Have you ever changed your visa type (nonimmigrant status) or U.S. immigration status? Yes If you answered "Yes," indicate the date and nature of the change: List all dates you entered and left the United States during 2023. See instructions. G Note: If you're a resident of Canada or Mexico AND commute to work in the United States at frequent intervals, Date entered United States Date entered United States Date departed United States **Date departed United States** mm/dd/yy mm/dd/yy mm/dd/yy mm/dd/yy Give number of days (including vacation, nonworkdays, and partial days) you were present in the United States during: н $2021 \underline{\hspace{1.5cm}}, 2022 \underline{\hspace{1.5cm}}, and 2023 \underline{\hspace{1.5cm}} 365 \underline{\hspace{1.5cm}}.$ ☐ Yes X No ı If "Yes," give the latest year and form number you filed: X No Yes J If "Yes," did the trust have a U.S. or foreign owner under the grantor trust rules, make a distribution or loan to a No Yes ⊠ No Κ Yes If "Yes," did you use an alternative method to determine the source of this compensation? ☐ No Income Exempt From Tax-If you are claiming exemption from income tax under a U.S. income tax treaty with a foreign country, L complete (1) through (3) below. See Pub. 901 for more information on tax treaties. Enter the name of the country, the applicable tax treaty article, the number of months in prior years you claimed the treaty benefit, and the amount of exempt income in the columns below. Attach Form 8833 if required. See instructions. (a) Country (b) Tax treaty article (c) Number of months (d) Amount of exempt claimed in prior tax years income in current tax vear (e) Total. Enter this amount on Form 1040-NR, line 1k. Do not enter it anywhere else on line 1 . . . 2. Were you subject to tax in a foreign country on any of the income shown in 1(d) above? No Yes X No If "Yes," attach a copy of the Competent Authority determination letter to your return. Check the applicable box if: 1. This is the first year you are making an election to treat income from real property located in the United States as effectively connected 2. You have made an election in a previous year that has not been revoked, to treat income from real property located in the United

SCHEDULE D (Form 1040)

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.

OMB No. 1545-0074

Attachment

Department of the Treasury Internal Revenue Service

Sequence No. 12 Go to www.irs.gov/ScheduleD for instructions and the latest information. Name(s) shown on return Your social security number BHAVANI SAI NIKHIL KOTTE 446-41-5460 Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss. Part I Short-Term Capital Gains and Losses—Generally Assets Held One Year or Less (see instructions)

| lines 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) (or other basis) | | | (g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g) | | (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 Box A checked | 106. | 108. | | | -2. |
| 2 | Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | | |
| 3 | Totals for all transactions reported on Form(s) 8949 with Box C checked | | | | | |
| 4 | Short-term gain from Form 6252 and short-term gain or (I | oss) from Forms 4 | 684, 6781, and 88 | 324 | 4 | |
| 5 | Net short-term gain or (loss) from partnerships, Schedule(s) K-1 | | | | 5 | |
| 6 | 6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions | | | | | () |
| 7 | 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back | | | | | -2. |
| Par | Long-Term Capital Gains and Losses—Ger | nerally Assets F | leld More Than | One Year | see i | instructions) |

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

See instructions for how to figure the amounts to enter on the

(h) Gain or (loss)

Schedule D (Form 1040) 2023 Page 2

Part III **Summary** 16 Combine lines 7 and 15 and enter the result 16 -2. • 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 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 2.<u>)</u> 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.

Form **8949**

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

2023

Attachment
Sequence No. 12A

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

Social security number or taxpayer identification number

446-41-5460

BHAVANI SAI NIKHIL KOTTE

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

Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see Part I instructions). For long-term transactions, see page 2. Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions). You must check Box A. B. or C below. Check only one box. If more than one box applies for your short-term transactions. complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need. 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 If you enter an amount in column (a). (h) enter a code in column (f). (d) Cost or other basis Gain or (loss) (c) (a) (b) See the separate instructions. Date sold or Proceeds See the **Note** below Subtract column (e) Description of property Date acquired disposed of and see Column (e) (sales price) from column (d) and (Example: 100 sh. XYZ Co.) (Mo., day, yr.) (Mo., day, yr.) (see instructions) in the separate combine the result (g) Code(s) from Amount of adjustment instructions. with column (a). instructions Robinhood Securities LLC 01/01/23 12/31/23 106. 108. -2. 2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your

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.

106.

-2.

Schedule D, line 1b (if Box A above is checked), line 2 (if Box B

above is checked), or line 3 (if Box C above is checked) .

108.