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



For the year Jan	. 1–Dec	c. 31, 2023, or other tax year beginning		, 2023, end	ling		, 20)	;	See se	parate ins	tructions.
Your first name	and mi	iddle initial	Last name					٦,	Your social security number			
YASHWANI	'H		THOTA							838 38 3713		
If joint return, sp	oouse's	s first name and middle initial	Last name							Spouse's social security number		
SRUJANA			JAKI	KULA						APP	LI E	D F
Home address	(numbe	er and street). If you have a P.O. box, see	instruct	ions.			Apt.	no.	T I	Preside	ntial Electi	ion Campaign
1458 WES	TME	ADE DR							(Check I	nere if you,	, or your
City, town, or p	ost offi	ce. If you have a foreign address, also co	mplete s	spaces below.	Sta	ite	ZIP code					ntly, want \$3
CHESTERE	'IELI				MC		63017				ow will not	Checking a t change
Foreign country	name			Foreign province/state/o	count	ty	Foreign po	stal c		7		
							You	Spouse				
Filing Status	, [Single				☐ Head of ho	ousehold	(HOH	1)			
Check only		Married filing jointly (even if only or	ne had	income)								
one box.		Married filing separately (MFS)				☐ Qualifying	surviving	spou	ıse (C	QSS)		
	If y	ou checked the MFS box, enter the	name (of your spouse. If you	ı che	ecked the HOH	or QSS	oox,	enter	the chi	ld's name	if the
	qu	alifying person is a child but not you	ır depei	ndent:								
Digital	Δt ar	ny time during 2023, did you: (a) rece	eive (as	a reward award or	navr	ment for prope	rty or sen	/ices	or (h	n) sell		
Assets		ange, or otherwise dispose of a digi					-				Yes	⊠ No
Standard	_	eone can claim: You as a de		_			, ,			,		
Deduction		Spouse itemizes on a separate return		•		•						
								1		1050		P - J
		Were born before January 2, 19	959 [Are blind Spo →	ouse	: U vvas bor	n before		•		Is bl	
Dependents				(2) Social security number	'	(3) Relationsh	ip · ·					e instructions): ther dependents
If more	(1) F	irst name Last name		Tiuttibei		to you		Child tax cre		uit	Credit for ot	
than four dependents,								L	_			
see instructions	s —							L	_			
and check								<u>[</u>	_			
here L	4.	Total amount from Form(s) W 2 ha	ov 1 /oc	a inat weatings)				L		140		<u> </u>
Income	1a	Total amount from Form(s) W-2, bo	`	,				•		1a 1b		90,330.
Attach Form(s)	b	Household employee wages not reported on Form(s) W-2									;	
W-2 here. Also attach Forms	c d										1	
W-2G and	u e											
1099-R if tax was withheld.	f	Employer-provided adoption benefits from Form 8839, line 29								1e 1f		
If you did not	g g	Wages from Form 8919, line 6.						•		1g		
get a Form	9 h	Other earned income (see instructi						•		1h		0.
W-2, see instructions.	i	Nontaxable combat pay election (s	,			1i	i	•				
	z	A del linea de Alexantela de								1z		96,530.
Attach Sch. B		1	2a	· · · · · · · · · · · · · · · · · · ·	b Т	axable interest	t			2b		193.
if required.	3a		3a			Ordinary divider				3b		63.
	4a		4a			axable amoun				4b		
Standard	5a		5a			axable amount				5b	,	
Deduction for— Single or	6a		6a			axable amount				6b		
Married filing separately,	С	If you elect to use the lump-sum election method, check here (see instructions)										
\$13,850	7	Capital gain or (loss). Attach Scheo	dule D i	if required. If not requ	uired	, check here			. 🗆	7		-856.
 Married filing jointly or 	8	Additional income from Schedule 1								8		
Qualifying surviving spouse,	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7,	and 8.	This is your total inc	come	e				9	1	95 , 930.
\$27,700	10	Adjustments to income from Scheo	dule 1,	line 26						10		
 Head of household, 	<u>11</u>	Subtract line 10 from line 9. This is	your a	djusted gross incon	ne					11	-	95 , 930.
\$20,800 If you checked	12	Standard deduction or itemized	deduct	tions (from Schedule	A)					12		27 , 700.
any box under	13	Qualified business income deducti	on fron	n Form 8995 or Form	899	5-A				13		0.
Standard Deduction,	14	Add lines 12 and 13								14	. :	27 , 700.
see instructions.	15	Subtract line 14 from line 11. If zero	o or les	ss, enter -0 This is y	our t	taxable incom	ie			15	,	68,230.

Form 1040 (202	3)								Page 2
Tax and	16	Tax (see instructions). Check i	f any from Form	(s): 1 881	4 2 4972	3 🗌		16	7,741.
Credits	17	Amount from Schedule 2, line						17	
	18	Add lines 16 and 17						18	7,741.
	19	Child tax credit or credit for o	other dependen	ts from Sched	ule 8812			19	
	20	Amount from Schedule 3, line	98					20	
	21	•						21	
	22	Subtract line 21 from line 18.						22	7,741.
	23	Other taxes, including self-er	nployment tax,	from Schedule	e 2, line 21			23	0.
	24	Add lines 22 and 23. This is y			·			24	7,741.
Payments	25	Federal income tax withheld							,
,	а	Form(s) W-2				25a 14	,897.		
	b	Form(s) 1099				25b	,		
	С	Other forms (see instructions)			25c			
	d	Add lines 25a through 25c .	,					25d	14,897.
If you have a	26	2023 estimated tax payments						26	,
If you have a liqualifying child,	27	Earned income credit (EIC) .		• •		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, line				31			
	32	Add lines 27, 28, 29, and 31.				indable credits		32	
	33	Add lines 25d, 26, and 32. Th						33	14,897.
Refund	34	If line 33 is more than line 24	•					34	7,156.
	35a	Amount of line 34 you want r				•	. 🖂	35a	7,156.
Direct deposit?	b	Routing number 1 1 1				_	Savings		
See instructions.	d								
	36	Amount of line 34 you want a		2024 estimate	ed tax	36			
Amount	37	Subtract line 33 from line 24.	This is the amo	ount vou owe					
You Owe	٠.	For details on how to pay, go to www.irs.gov/Payments or see instructions						37	
	38	Estimated tax penalty (see in	structions) .			38			
Third Party		you want to allow another	•					· .	
Designee		structions					omplete I		⊠ No
		signee's me		Phone no.			onal identi ber (PIN)	rication	
Sign		der penalties of perjury, I declare th							
Here									nt vou an Identity
	10	ur signature	Date Your occupation					IN, enter it here	
Joint return?				SOFTWARE ENGINE			(see	inst.)	
See instructions.		ouse's signature. If a joint return, b	oth must sign.	Date	Spouse's occupati	on			nt your spouse an
Keep a copy for your records.							1	tity Prot inst.)	ection PIN, enter it here
,		/FP1\ 0.4.4. FFF.	<u> </u>	- " "	HOME MAKER			1130.)	
		one no. (571) 344-5553 eparer's name	Preparer's signat	Email address	YASHWANTH8	63@GMAIL.CC	M PTIN		Check if:
Paid		'			CIIDMA MATTEL			0700	Self-employed
Preparer		1 PRIYA RAM SAGAR GUPTA TALLAM		KAM SAGAR	GUPTA TALLAM	02/20/2024	P0208		
Use Only		m's name GLOBAL TAX		INICIAT OIZ NI	T 00016				(678) 965-9522
		m's address 245 ROONEY		INSWICK N			Firm	's EIN	84-3171965 Form 1040 (2023)
COLO M/W/W/ILC U	uvirnr	n rugo ior instructions and the lates	a muormation		DAA	DEV/ 02/44/24 DDO			Form (U4U (2023)

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

OMB No. 1545-0074

2023

Attachment Sequence No. **12**

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

yashwanth thota & srujana jakkula

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?

If "Yes." attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Your social security number 838-38-3713

Part I Short-Term Capital Gains and Losses - Generally Assets Held One Year or Less (see instructions) See instructions for how to figure the amounts to enter on the (h) Gain or (loss) (g) Adjustments Subtract column (e) lines below. Proceeds Cost to gain or loss from from column (d) and This form may be easier to complete if you round off cents to (sales price) (or other basis) Form(s) 8949, Part I, combine the result whole dollars. with column (g) line 2. column (a) 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 39,930. 37,735. 152. 2,347. 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 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 4 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from 5 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover 6 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h), If you have any longterm capital gains or losses, go to Part II below. Otherwise, go to Part III on the back 7 2,347. Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions) See instructions for how to figure the amounts to enter on the (h) Gain or (loss) (g) Adjustments Subtract column (e) (d) (e) lines below. Proceeds to gain or loss from from column (d) and Cost This form may be easier to complete if you round off cents to (or other basis) Form(s) 8949, Part II, (sales price) combine the result whole dollars. line 2. column (a) with column (a) 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 3,605. -3,203.5,270. 12,078. Totals for all transactions reported on Form(s) 8949 with **Box E** checked 10 Totals for all transactions reported on Form(s) 8949 with

12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1

15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III

-3,203.

11

12

13

14

15

Schedule D (Form 1040) 2023 Page 2

Part III **Summary** -856. 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 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 856.) 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 X 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.

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.

Attachment Sequence No. 12A

OMB No. 1545-0074

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

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

Social security number or taxpayer identification number

YASHWANTH THOTA & SRUJANA JAKKULA

838-38-3713

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 										
1		(a) ription of property	(b) Date acquired	(c) Date sold or	(d) Proceeds	(e) Cost or other basis See the Note below and see <i>Column</i> (e) in the separate instructions.	Adjustment, i If you enter an enter a co See the sep	(h) Gain or (loss) Subtract column (e)			
		(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of (Mo., day, yr.)	(sales price) (see instructions)		(f) Code(s) from instructions	(g) Amount of adjustment	from column (d) and combine the result with column (g).		
Ro	binhood S	Securities LLC	01/01/23	12/31/23	39,930.	37,735.	W	152.	2,347.		
2	negative amo	the amounts in columnation to the columns ounts). Enter each totaline 1b (if Box A above cked), or line 3 (if Box 6)	al here and inc e is checked), lir	lude on your ne 2 (if Box B	39,930.	37,735.		152.	2,347.		

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.

Form 8949 (2023) Attachment Sequence No. **12A** Page **2**

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side ${\tt YASHWANTH\ THOTA\ \&\ SRUJANA\ JAKKULA}$

Social security number or taxpayer identification number 838-38-3713

Before you check Box D, E, or F 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 II

Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-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 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-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 (D) Long-term transactions☐ (E) Long-term transactions☐ (F) Long-term transactions	reported on	Form(s) 1099	-B showing bas				•)
1 (a) Description of property	(b) Date acquired (Mo., day, yr.)	(c) Date sold or	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column</i> (e) in the separate instructions.	Adjustment, i If you enter an enter a co See the sep	(h) Gain or (loss) Subtract column (e)	
(Example: 100 sh. XYZ Co.)					(f) Code(s) from instructions	(g) Amount of adjustment	from column (d) and combine the result with column (g).
Robinhood Securities LLC	01/01/23	12/31/23	5,270.	12,078.	W	3,605.	-3,203.
2 Totals. Add the amounts in columns							

Note: If you checked Box D 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 D, line 8b (if Box D above is checked), line 9 (if Box E

above is checked), or line 10 (if Box F above is checked) .

-3,203.

3,605.

5,270.

12,078.

Form **8995**

Department of the Treasury

Internal Revenue Service

Qualified Business Income Deduction Simplified Computation

Attach to your tax return.

Go to www.irs.gov/Form8995 for instructions and the latest information.

OMB No. 1545-2294

2023

Attachment Sequence No. **55**

Name(s) shown on return $\mbox{YASHWANTH THOTA \& SRUJANA JAKKULA}$

Your taxpayer identification number 838-38-3713

Note. You can claim the qualified business income deduction **only** if you have qualified business income from a qualified trade or business, real estate investment trust dividends, publicly traded partnership income, or a domestic production activities deduction passed through from an agricultural or horticultural cooperative. See instructions.

Use this form if your taxable income, before your qualified business income deduction, is at or below \$182,100 (\$364,200 if married filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number		Qualified business income or (loss)
i				
ii				
iii				
iv				
v				
2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)	2		
3 4 5	Qualified business net (loss) carryforward from the prior year	3 (5	
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions)	6 2.	3	
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7 (
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0	8 2.		
9	· · · · · · · · · · · · · · · · · · ·		9	0.
10	Qualified business income deduction before the income limitation. Add lines 5 an	i i	10	0.
11	Taxable income before qualified business income deduction (see instructions)	11 68,230.	_	
12	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	12 61.		
13	Subtract line 12 from line 11. If zero or less, enter -0	13 68,169.		12 624
14	Income limitation. Multiply line 13 by 20% (0.20)		14	13,634.
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also the applicable line of your return (see instructions)		15	0.
16				(0.)
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 a	nd 7. If greater than		(0.)
16 17	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater thar Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 a zero, enter -0	nd 7. If greater than	16	(



Application for IRS Individual Taxpayer Identification Number

For use by individuals who are not U.S. citizens or permanent residents. ► See separate instructions.

An IRS individual taxpayer identification number (ITIN) is for U.S. federal tax purposes only.

OMB No. 1545-0074

An IRS individual	l taxpayer identification n	umber (ITIN) is	s for U.S. feder	al tax purposes	only.		on type (check one box):			
Before you begin • Don't submit th	: is form if you have, or are e	ligible to get, a	u.S. social sec	urity number (SS	SN).		oply for a new ITIN enew an existing ITIN			
	ubmitting Form W-7. Read ederal tax return with Forn									
a Nonresident	alien required to get an ITIN to	claim tax treaty	/ benefit	-			•			
b ☐ Nonresident alien filing a U.S. federal tax return										
c U.S. resident alien (based on days present in the United States) filing a U.S. federal tax return										
d Dependent	of U.S. citizen/resident alien	If d , enter relat	ionship to U.S. cit	tizen/resident alien	(see instr	ructions) 🕨				
e 🛛 Spouse of U	J.S. citizen/resident alien	If d or e , enter		ΠN of U.S. citizen/			000 00 0040			
f Nonresident	alien student, professor, or res	searcher filing a	U.S. federal tax re	eturn or claiming a	n exceptic	n				
g Dependent/s	spouse of a nonresident alien h	olding a U.S. vis	sa							
h Other (see in	,									
Additional information	on for a and f : Enter treaty cour	ntry ►	National Control	and treaty an						
Name	1a First name		Middle name		Last n					
(see instructions)	SRUJANA		NAC-1-II		_	KULA				
Name at birth if different ▶	1b First name		Middle name		Last n					
Applicant's	2 Street address, apartment	-	al route number. I I	you have a P.O.	box, see	separate ii	nstructions.			
Mailing	1458 WESTMEADE DR City or town, state or province, and country. Include ZIP code or postal code where appropriate.									
Address		ince, and count	ry. Include ZIP co							
		CHESTERFIELD MO USA								
Foreign (non-	3 Street address, apartment number, or rural route number. Don't use a P.O. box number.									
U.S.) Address (see instructions)	City or town, state or province, and country. Include postal code where appropriate.									
Birth	4 Date of birth (month / day / y	ear) Country of	birth	City and state or	province	(optional)	5 Male			
Information	09/10/1996	INDIA			•	` ' '	Female			
Other	6a Country(ies) of citizenship	6b Foreign	tax I.D. number (it	fany) 6c Type	of U.S. vis	sa (if any), n	umber, and expiration date			
Information	INDIA	INDIA								
mormanon	6d Identification document(s) submitted (see instructions) ✓ Passport □ Driver's license/State I.D.									
	USCIS documentation Other Date of entry into									
	1						the United States			
	Issued by: INDIA No.: MO778493 Exp. date: 08/06/2024 (MM/DD/YYYY):									
	6e Have you previously received an ITIN or an Internal Revenue Service Number (IRSN)?									
	No/Don't know. Skip line 6f. Yes. Complete line 6f. If more than one, list on a sheet and attach to this form (see instructions).									
	•	instruction	าร).							
	6f Enter ITIN and/or IRSN ▶		IRSN				and			
	name under which it was issued ▶									
	6g Name of college/university or company (see instructions) ▶									
	City and state ► Length of stay ►									
Sign Here	Under penalties of perjury, I (a documentation and statements, information with my acceptance a	and to the best	of my knowledge a	nd belief, it is true,	correct, a	nd complete	e. I authorize the IRS to share			
Keep a copy for your records.	Signature of applicant (if	structions)	Date (month / day	/ year)	Phone number					
,	Name of delegate, if app	licable (type or p	orint)	Delegate's relation to applicant			Parent Court-appointed guardial Power of attorney			
Acceptance	Signature			Date (month / day	/ year)	Phone				
Acceptance										
Agent's Use ONLY	Name and title (type or p	rint)	Name of c	ompany	EIN		PTIN			
						Office code				