

Form 1040 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–Dec. 31, 2023, or other tax year beginning 2023, ending 2023, ending 20, See separate instructions.

Personal information section including names (Xavier Becerra, Carolyn Reyes), social security numbers, and home address.

Filing Status section with options for Single, Married filing jointly (checked), Married filing separately, Head of household, and Qualifying surviving spouse.

Digital Assets section: At any time during 2023, did you: (a) receive... or (b) sell, exchange, or otherwise dispose of a digital asset? (Checked No)

Standard Deduction section: Someone can claim: (Checked) You as a dependent, ( ) Your spouse as a dependent, ( ) Spouse itemizes on a separate return or you were a dual-status alien.

Age/Blindness section: You: (Checked) Were born before January 2, 1959, ( ) Are blind, Spouse: ( ) Was born before January 2, 1959, ( ) Is blind.

Table for Dependents with columns for First name, Last name, Social security number, Relationship to you, Child tax credit, and Credit for other dependents.

Main income table with rows 1a through 15, including Total amount from Form(s) W-2, Tax-exempt interest, Qualified dividends, IRA distributions, Pensions and annuities, Soc. sec. ben., Capital gain or (loss), Other income from Schedule 1, Adjustments to income, Standard deduction, Qualified business income deduction, and Taxable Income.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Form 1040 (2023)

Form 1040 (2023) Xavier Becerra & Carolyn Reyes

<b>Tax and Credits</b>	16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972	16	102,146
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	102,146
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	29
	21	Add lines 19 and 20	21	29
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	102,117
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	16,173
24	Add lines 22 and 23. This is your total tax	24	118,290	

<b>Payments</b>	25	Federal income tax withheld from:		
	a	Form(s) W-2	25a	27,403
	b	Form(s) 1099	25b	
	c	Other forms (see instructions)	25c	
	d	Add lines 25a through 25c	25d	27,403
	26	2023 estimated tax payments and amount applied from 2022 return	26	76,000
	27	Earned income credit (EIC)	27	
	28	Additional child tax credit from Schedule 8812	28	
	29	American opportunity credit from Form 8863, 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 your total other payments and refundable credits	32		
33	Add lines 25d, 26, and 32. These are your total payments	33	103,403	

<b>Refund</b>	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	
	35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	35a	
	b	Routing number <input type="text"/> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
	d	Account number <input type="text"/>		
36	Amount of line 34 you want applied to your 2024 estimated tax	36		

<b>Amount You Owe</b>	37	Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to <a href="http://www.irs.gov/Payments">www.irs.gov/Payments</a> or see instructions	37	15,917
	38	Estimated tax penalty (see instructions)	38	1,030

**Third Party Designee** Do you want to allow another person to discuss this return with the IRS? See instructions  Yes. Complete below.  No

Designee's name Robert J. Herrera, EA Phone no.  Personal identification number (PIN)

**Sign Here** Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see Instr.)
<u>[Signature]</u>		<u>US HHS Secretary</u>	<input type="text"/>
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see Instr.)
		<u>Physician</u>	<input type="text"/>

Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed
<u>Robert J. Herrera, EA</u>	<u>Robert J. Herrera, EA</u>	<u>04/08/24</u>	<input type="text"/>	
Firm's name	Firm's address		Phone no.	Firm's EIN
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>

Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

**SCHEDULE 1**  
**(Form 1040)**

**Additional Income and Adjustments to Income**

OMB No. 1545-0074

**2023**

Attachment  
Sequence No. **01**

Department of the Treasury  
Internal Revenue Service

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

Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

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

Xavier Becerra & Carolyn Reyes

Your social security number

[REDACTED]

**Part I Additional Income**

<b>1</b>	Taxable refunds, credits, or offsets of state and local income taxes	<b>1</b>	
<b>2a</b>	Alimony received	<b>2a</b>	
<b>b</b>	Date of original divorce or separation agreement (see instructions): _____		
<b>3</b>	Business income or (loss). Attach Schedule C	<b>3</b>	185,446
<b>4</b>	Other gains or (losses). Attach Form 4797	<b>4</b>	
<b>5</b>	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	<b>5</b>	85,071
<b>6</b>	Farm income or (loss). Attach Schedule F	<b>6</b>	
<b>7</b>	Unemployment compensation	<b>7</b>	
<b>8</b>	Other income:		
<b>a</b>	Net operating loss	<b>8a</b>	( )
<b>b</b>	Gambling	<b>8b</b>	
<b>c</b>	Cancellation of debt	<b>8c</b>	
<b>d</b>	Foreign earned income exclusion from Form 2555	<b>8d</b>	( )
<b>e</b>	Income from Form 8853	<b>8e</b>	
<b>f</b>	Income from Form 8889	<b>8f</b>	
<b>g</b>	Alaska Permanent Fund dividends	<b>8g</b>	
<b>h</b>	Jury duty pay	<b>8h</b>	
<b>i</b>	Prizes and awards	<b>8i</b>	
<b>j</b>	Activity not engaged in for profit income	<b>8j</b>	
<b>k</b>	Stock options	<b>8k</b>	
<b>l</b>	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	<b>8l</b>	
<b>m</b>	Olympic and Paralympic medals and USOC prize money (see instructions)	<b>8m</b>	
<b>n</b>	Section 951(a) inclusion (see instructions)	<b>8n</b>	
<b>o</b>	Section 951A(a) inclusion (see instructions)	<b>8o</b>	
<b>p</b>	Section 461(l) excess business loss adjustment	<b>8p</b>	
<b>q</b>	Taxable distributions from an ABLE account (see instructions)	<b>8q</b>	
<b>r</b>	Scholarship and fellowship grants not reported on Form W-2	<b>8r</b>	
<b>s</b>	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	<b>8s</b>	( )
<b>t</b>	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	<b>8t</b>	
<b>u</b>	Wages earned while incarcerated	<b>8u</b>	
<b>z</b>	Other income. List type and amount: _____	<b>8z</b>	
<b>9</b>	Total other income. Add lines 8a through 8z	<b>9</b>	
<b>10</b>	Combine lines 1 through 7 and 9. This is your <b>additional income</b> . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	<b>10</b>	270,517

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

Schedule 1 (Form 1040) 2023

**Part II Adjustments to Income**

11	Educator expenses		11	
12	Certain business expenses of reservists, performing artists, and fee-basis government 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	5,368
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			
	c 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:			
	a Jury duty pay (see instructions)	24a		
	b Deductible expenses related to income reported on line 8l from the rental of personal property engaged in for profit	24b		
	c Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8m	24c		
	d Reforestation amortization and expenses	24d		
	e Repayment of supplemental unemployment benefits under the Trade Act of 1974	24e		
	f Contributions to section 501(c)(18)(D) pension plans	24f		
	g Contributions by certain chaplains to section 403(b) plans	24g		
	h Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions)	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 adjustments to income. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 10		26	5,368

**SCHEDULE 2**  
**(Form 1040)**

**Additional Taxes**

OMB No. 1545-0074

**2023**

Attachment  
Sequence No. **02**

Department of the Treasury  
Internal Revenue Service

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

Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

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

Xavier Becerra & Carolyn Reyes

Your social security number

[REDACTED]

**Part I Tax**

1	Alternative minimum tax. Attach Form 6251	1	
2	Excess advance premium tax credit repayment. Attach Form 8962	2	
3	Add lines 1 and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17	3	

**Part II Other Taxes**

4	Self-employment tax. Attach Schedule SE	4	10,736
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here <input type="checkbox"/>	8	
9	Household employment taxes. Attach Schedule H	9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10	
11	Additional Medicare Tax. Attach Form 8959	11	2,098
12	Net investment income tax. Attach Form 8960	12	3,339
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2023

Xavier Becerra & Carolyn Reyes

Schedule 2 (Form 1040) 2023

**Part II Other Taxes (continued)**

<b>17</b> Other additional taxes:			
<b>a</b> Recapture of other credits. List type, form number, and amount:	<b>17a</b>		
<b>b</b> Recapture of federal mortgage subsidy, if you sold your home see instructions	<b>17b</b>		
<b>c</b> Additional tax on HSA distributions. Attach Form 8889	<b>17c</b>		
<b>d</b> Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	<b>17d</b>		
<b>e</b> Additional tax on Archer MSA distributions. Attach Form 8853	<b>17e</b>		
<b>f</b> Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	<b>17f</b>		
<b>g</b> Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	<b>17g</b>		
<b>h</b> Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	<b>17h</b>		
<b>i</b> Compensation you received from a nonqualified deferred compensation plan described in section 457A	<b>17i</b>		
<b>j</b> Section 72(m)(5) excess benefits tax	<b>17j</b>		
<b>k</b> Golden parachute payments	<b>17k</b>		
<b>l</b> Tax on accumulation distribution of trusts	<b>17l</b>		
<b>m</b> Excise tax on insider stock compensation from an expatriated corporation	<b>17m</b>		
<b>n</b> Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	<b>17n</b>		
<b>o</b> Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	<b>17o</b>		
<b>p</b> Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	<b>17p</b>		
<b>q</b> Any interest from Form 8621, line 24	<b>17q</b>		
<b>z</b> Any other taxes. List type and amount:	<b>17z</b>		
<b>18</b> Total additional taxes. Add lines 17a through 17z		<b>18</b>	
<b>19</b> Reserved for future use		<b>19</b>	
<b>20</b> Section 965 net tax liability installment from Form 965-A	<b>20</b>		
<b>21</b> Add lines 4, 7 through 16, and 18. These are your <b>total other taxes</b> . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		<b>21</b>	16,173

**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](http://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

Xavier Becerra & Carolyn Reyes

Your social security number

[REDACTED]

**Part I Nonrefundable Credits**

1	Foreign tax credit. Attach Form 1116 if required		1	29
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441		2	
3	Education credits from Form 8863, line 19		3	
4	Retirement savings contributions credit. Attach Form 8880		4	
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:			
a	General business credit. Attach Form 3800	6a		
b	Credit for prior year minimum tax. Attach Form 8801	6b		
c	Adoption credit. Attach Form 8839	6c		
d	Credit for the elderly or disabled. Attach Schedule R	6d		
e	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		
l	Amount on Form 8978, line 14. See instructions	6l		
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 1040, 1040-SR, or 1040-NR, line 20		8	29

(continued on page 2)

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

Schedule 3 (Form 1040) 2023

**SCHEDULE A**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service

**Itemized Deductions**

Attach to Form 1040 or 1040-SR.

Go to [www.irs.gov/ScheduleA](http://www.irs.gov/ScheduleA) for instructions and the latest information.

**Caution:** If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

OMB No. 1545-0074

**2023**

Attachment  
Sequence No. **07**

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

Xavier Becerra & Carolyn Reyes

Your social security number

<b>Medical and Dental Expenses</b>	<b>Caution:</b> Do not include expenses reimbursed or paid by others.			
	1 Medical and dental expenses (see instructions) .....	1		
	2 Enter amount from Form 1040 or 1040-SR, line 11 .....	2		
	3 Multiply line 2 by 7.5% (0.075) .....	3		
	4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4		
<b>Taxes You Paid</b>	5 State and local taxes.			
	a State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box <input type="checkbox"/>	5a	29,147	
	b State and local real estate taxes (see instructions) .....	5b	25,919	
	c State and local personal property taxes .....	5c	378	
	d Add lines 5a through 5c .....	5d	55,444	
	e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately) .....	5e	10,000	
	6 Other taxes. List type and amount: .....	6		
7 Add lines 5e and 6 .....	7		10,000	
<b>Interest You Paid</b>	8 Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box <input type="checkbox"/>			
	a Home mortgage interest and points reported to you on Form 1098. See instructions if limited .....	8a		
	b Home mortgage interest not reported to you on Form 1098. See instructions if limited. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address .....	8b		
	c Points not reported to you on Form 1098. See instructions for special rules .....	8c		
	d Reserved for future use .....	8d		
	e Add lines 8a through 8c .....	8e		
9 Investment interest. Attach Form 4952 if required. See instructions .....	9	128		
10 Add lines 8e and 9 .....	10		128	
<b>Gifts to Charity</b>	11 Gifts by cash or check. If you made any gift of \$250 or more, see instructions .....	11	10,765	
	12 Other than by cash or check. If you made any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500 .....	12	50	
	13 Carryover from prior year .....	13		
	14 Add lines 11 through 13 .....	14		10,815
<b>Casualty and Theft Losses</b>	15 Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions .....	15		
<b>Other Itemized Deductions</b>	16 Other—from list in instructions. List type and amount: .....	16		
<b>Total Itemized Deductions</b>	17 Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040 or 1040-SR, line 12 .....	17		20,943
	18 If you elect to itemize deductions even though they are less than your standard deduction, check this box <input type="checkbox"/>			

For Paperwork Reduction Act Notice, see the Instructions for Form 1040.

Schedule A (Form 1040) 2023

**SCHEDULE B**  
**(Form 1040)**

**Interest and Ordinary Dividends**

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OMB No. 1545-0074

**2023**

Attachment  
Sequence No. **08**

Department of the Treasury  
Internal Revenue Service

Attach to Form 1040 or 1040-SR.

Go to [www.irs.gov/ScheduleB](http://www.irs.gov/ScheduleB) for instructions and the latest information.

Name(s) shown on return

Xavier Becerra & Carolyn Reyes

Your social security number

[REDACTED]

		Amount
<b>Part I</b> <b>Interest</b>  (See instructions and the Instructions for Form 1040, line 2b.) <b>Note:</b> If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.	<b>1</b> List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address: <u>Charles Schwab</u> <u>Congressional FCU</u> <u>Congressional FCU</u> <u>Congressional FCU</u> <u>Golden 1 Credit Union</u>	383 57 68 66 282
	<b>2</b> Add the amounts on line 1	856
	<b>3</b> Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	
	<b>4</b> Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b	856
	<b>Note:</b> If line 4 is over \$1,500, you must complete Part III.	<b>Amount</b>

<b>Part II</b> <b>Ordinary Dividends</b>  (See instructions and the Instructions for Form 1040, line 3b.) <b>Note:</b> If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.	<b>5</b> List name of payer: <u>Charles Schwab</u>	4,943
	<b>6</b> Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b	4,943
<b>Note:</b> If line 6 is over \$1,500, you must complete Part III.		<b>Amount</b>

		Yes	No
<b>Part III</b> <b>Foreign Accounts and Trusts</b>	You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.		
<b>7a</b>	At any time during 2023, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions		X
<b>Caution:</b> If required, failure to file FinCEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instructions.	If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		
<b>b</b>	If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:		
<b>8</b>	During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions		X

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

Schedule B (Form 1040) 2023

**SCHEDULE C**  
**(Form 1040)**

**Profit or Loss From Business**  
**(Sole Proprietorship)**

91337 04/08/2024 8:33 PM

OMB No. 1545-0074

**2023**

Attachment  
Sequence No. **09**

Department of the Treasury  
Internal Revenue Service

Attach to Form 1040, 1040-SR, 1040-SS, 1040-NR, or 1041; partnerships must generally file Form 1065.  
Go to [www.irs.gov/ScheduleC](http://www.irs.gov/ScheduleC) for instructions and the latest information.

Name of proprietor <u>Carolyn Reyes</u>		Social security number (SSN) [REDACTED]
<b>A</b> Principal business or profession, including product or service (see instructions) <u>Director Services</u>	<b>B</b> Enter code from Instructions <u>621399</u>	
<b>C</b> Business name. If no separate business name, leave blank.	<b>D</b> Employer ID number (EIN) (see instr.)	
<b>E</b> Business address (including suite or room no.) City, town or post office, state, and ZIP code		
<b>F</b> Accounting method: (1) <input checked="" type="checkbox"/> Cash (2) <input type="checkbox"/> Accrual (3) <input type="checkbox"/> Other (specify)		
<b>G</b> Did you "materially participate" in the operation of this business during 2023? If "No," see instructions for limit on losses		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>H</b> If you started or acquired this business during 2023, check here		<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>I</b> Did you make any payments in 2023 that would require you to file Form(s) 1099? See instructions		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>J</b> If "Yes," did you or will you file required Form(s) 1099?		<input type="checkbox"/> Yes <input type="checkbox"/> No

**Part I Income**

<b>1</b> Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked <input type="checkbox"/>	<b>1</b>	190,750
<b>2</b> Returns and allowances	<b>2</b>	
<b>3</b> Subtract line 2 from line 1	<b>3</b>	190,750
<b>4</b> Cost of goods sold (from line 42)	<b>4</b>	
<b>5</b> Gross profit. Subtract line 4 from line 3	<b>5</b>	190,750
<b>6</b> Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)	<b>6</b>	
<b>7</b> Gross income. Add lines 5 and 6	<b>7</b>	190,750

**Part II Expenses. Enter expenses for business use of your home only on line 30.**

<b>8</b> Advertising	<b>8</b>		<b>18</b> Office expense (see instructions)	<b>18</b>	
<b>9</b> Car and truck expenses (see instructions)	<b>9</b>		<b>19</b> Pension and profit-sharing plans	<b>19</b>	
<b>10</b> Commissions and fees	<b>10</b>		<b>20</b> Rent or lease (see instructions):		
<b>11</b> Contract labor (see instructions)	<b>11</b>		<b>a</b> Vehicles, machinery, and equipment	<b>20a</b>	
<b>12</b> Depletion	<b>12</b>		<b>b</b> Other business property	<b>20b</b>	
<b>13</b> Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	<b>13</b>		<b>21</b> Repairs and maintenance	<b>21</b>	
<b>14</b> Employee benefit programs (other than on line 19)	<b>14</b>		<b>22</b> Supplies (not included in Part III)	<b>22</b>	
<b>15</b> Insurance (other than health)	<b>15</b>		<b>23</b> Taxes and licenses	<b>23</b>	1,294
<b>16</b> Interest (see instructions):			<b>24</b> Travel and meals:		
<b>a</b> Mortgage (paid to banks, etc.)	<b>16a</b>		<b>a</b> Travel	<b>24a</b>	
<b>b</b> Other	<b>16b</b>		<b>b</b> Deductible meals (see instructions)	<b>24b</b>	
<b>17</b> Legal and professional services	<b>17</b>		<b>25</b> Utilities	<b>25</b>	
			<b>26</b> Wages (less employment credits)	<b>26</b>	
			<b>27a</b> Other expenses (from line 48)	<b>27a</b>	4,010
			<b>b</b> Energy efficient commercial bldgs deduction (attach Form 7205)	<b>27b</b>	
<b>28</b> Total expenses before expenses for business use of home. Add lines 8 through 27b	<b>28</b>	5,304			
<b>29</b> Tentative profit or (loss). Subtract line 28 from line 7	<b>29</b>	185,446			
<b>30</b> Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions. <b>Simplified method filers only:</b> Enter the total square footage of (a) your home: _____ and (b) the part of your home used for business: _____. Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30	<b>30</b>				
<b>31</b> Net profit or (loss). Subtract line 30 from line 29. • If a profit, enter on both <b>Schedule 1 (Form 1040), line 3</b> , and on <b>Schedule SE, line 2</b> . (If you checked the box on line 1, see instructions.) Estates and trusts, enter on <b>Form 1041, line 3</b> . • If a loss, you must go to line 32.	<b>31</b>	185,446			
<b>32</b> If you have a loss, check the box that describes your investment in this activity. See instructions. • If you checked 32a, enter the loss on both <b>Schedule 1 (Form 1040), line 3</b> , and on <b>Schedule SE, line 2</b> . (If you checked the box on line 1, see the line 31 instructions.) Estates and trusts, enter on <b>Form 1041, line 3</b> . • If you checked 32b, you must attach <b>Form 6198</b> . Your loss may be limited.			<b>32a</b> <input type="checkbox"/> All investment is at risk.		
			<b>32b</b> <input type="checkbox"/> Some investment is not at risk.		



**SCHEDULE D**  
(Form 1040)

**Capital Gains and Losses**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

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](http://www.irs.gov/ScheduleD) for instructions and the latest information.

**2023**

Attachment  
Sequence No. **12**

Name(s) shown on return Xavier Becerra & Carolyn Reyes Your social security number XXXXXXXXXX

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?  Yes  No

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (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)
<b>1a</b> 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				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked	5,000	5,224	0	-224
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked				
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked				
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions				6 ( 397)
<b>7</b> <b>Net short-term capital gain or (loss)</b> . 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				7 -621

**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 lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>8a</b> 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				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked	74,296	83,344	0	-9,048
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked				
<b>11</b> Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
<b>13</b> Capital gain distributions. See the instructions				13 3,600
<b>14</b> Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions				14 ( 715)
<b>15</b> <b>Net long-term capital gain or (loss)</b> . Combine lines 8a through 14 in column (h). Then, go to Part III on the back				15 -6,163

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

Schedule D (Form 1040) 2023

**Part III Summary**

<p><b>16</b> Combine lines 7 and 15 and enter the result</p>	<b>16</b>	-6,784
<p>• If line 16 is a <b>gain</b>, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.</p> <p>• If line 16 is a <b>loss</b>, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.</p> <p>• If line 16 is <b>zero</b>, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.</p>		
<p><b>17</b> Are lines 15 and 16 <b>both</b> gains?</p> <p><input type="checkbox"/> <b>Yes.</b> Go to line 18.</p> <p><input type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.</p>		
<p><b>18</b> If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet</p>	<b>18</b>	
<p><b>19</b> If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet</p>	<b>19</b>	
<p><b>20</b> Are lines 18 and 19 both zero or blank and are you not filing Form 4952?</p> <p><input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below.</p> <p><input type="checkbox"/> <b>No.</b> Complete the <b>Schedule D Tax Worksheet</b> in the instructions. Don't complete lines 21 and 22 below.</p>		
<p><b>21</b> If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the <b>smaller</b> of:</p> <p>• The loss on line 16; or</p> <p>• (\$3,000), or if married filing separately, (\$1,500)</p>	<b>21</b>	( 3,000)
<p><b>Note:</b> When figuring which amount is smaller, treat both amounts as positive numbers.</p>		
<p><b>22</b> Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?</p> <p><input checked="" type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Form 1040, line 16.</p> <p><input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.</p>		

Form **8949**

## Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

2023

Department of the Treasury  
Internal Revenue Service

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](http://www.irs.gov/Form8949) for instructions and the latest information.

Attachment  
Sequence No. **12A**

Name(s) shown on return

Social security number or taxpayer identification number

**Xavier Becerra & Carolyn Reyes**

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

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

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

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

- (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- (B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
- (C) Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	72.000 sh Calvert Equity A	02/17/22	01/25/23	5,000	5,224			-224
<b>2</b>	<b>Totals.</b> 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 above is checked), or line 3 (if Box C above is checked)			5,000	5,224		0	-224

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

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



SCHEDULE E

(Form 1040)

Department of the Treasury Internal Revenue Service

Name(s) shown on return

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.

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

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OMB No. 1545-0074

2023

Attachment Sequence No. 13

Your social security number

Xavier Becerra & Carolyn Reyes

Part I Income or Loss From Rental Real Estate and Royalties

Note: If you are in the business of renting personal property, use Schedule C. See instructions. If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

A Did you make any payments in 2023 that would require you to file Form(s) 1099? See instructions Yes No
B If "Yes," did you or will you file required Form(s) 1099? Yes No

1a Physical address of each property (street, city, state, ZIP code)
A
B
C

Table with columns: 1b Type of Property (from list below), 2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions. Fair Rental Days, Personal Use Days, QJV.

Type of Property:

- 1 Single Family Residence 3 Vacation/Short-Term Rental 5 Land 7 Self-Rental
2 Multi-Family Residence 4 Commercial 6 Royalties 8 Other (describe)

Main table with columns: Income, Expenses, Properties (A, B, C), and Total. Rows include Rents received, Royalties received, Advertising, Auto and travel, Cleaning and maintenance, Commissions, Insurance, Legal and other professional fees, Management fees, Mortgage interest paid, Other interest, Repairs, Supplies, Taxes, Utilities, Depreciation expense or depletion, Other (list), Total expenses, Subtract line 20 from line 3, Deductible rental real estate loss, Total of all amounts reported, Income, Losses, Total rental real estate and royalty income or (loss).

For Paperwork Reduction Act Notice, see the separate instructions.

SCHEDULE E

(Form 1040)

Department of the Treasury Internal Revenue Service

Name(s) shown on return

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.

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

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OMB No. 1545-0074

2023

Attachment Sequence No. 13

Xavier Becerra & Carolyn Reyes

Your social security number

Part I Income or Loss From Rental Real Estate and Royalties

Note: If you are in the business of renting personal property, use Schedule C. See instructions. If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

Table with 2 columns: Question (A, B) and Yes/No options.

Table for physical address of each property (1a) with columns A, B, C.

Table for Type of Property (1b) with columns: Type of Property, Fair Rental Days, Personal Use Days, QJV.

Type of Property:

- 1 Single Family Residence, 2 Multi-Family Residence, 3 Vacation/Short-Term Rental, 4 Commercial, 5 Land, 6 Royalties, 7 Self-Rental, 8 Other (describe)

Main income/expense table with columns: Income/Expenses, Properties (A, B, C), and Total.

For Paperwork Reduction Act Notice, see the separate instructions.

**SCHEDULE SE**  
**(Form 1040)**

**Self-Employment Tax**

OMB No. 1545-0074

**2023**

Department of the Treasury  
Internal Revenue Service

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

Go to [www.irs.gov/ScheduleSE](http://www.irs.gov/ScheduleSE) for instructions and the latest information.

Attachment  
Sequence No. **17**

Name of person with self-employment income (as shown on Form 1040, 1040-SR, 1040-SS, or 1040-NR)

Social security number of person  
with self-employment income

Carolyn Reyes

**Part I Self-Employment Tax**

**Note:** If your only income subject to self-employment tax is church employee income, see instructions for how to report your income and the definition of church employee income.

**A** If you are a minister, member of a religious order, or Christian Science practitioner and you filed Form 4361, but you had \$400 or more of other net earnings from self-employment, check here and continue with Part I

Skip lines 1a and 1b if you use the farm optional method in Part II. See instructions.

**1a** Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A

**1a**

**b** If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code AQ

**1b**

Skip line 2 if you use the nonfarm optional method in Part II. See instructions.

**2** Net profit or (loss) from Schedule C, line 31; and Schedule K-1 (Form 1065), box 14, code A (other than farming). See instructions for other income to report or if you are a minister or member of a religious order

**2**

185,446

**3** Combine lines 1a, 1b, and 2

**3**

185,446

**4a** If line 3 is more than zero, multiply line 3 by 92.35% (0.9235). Otherwise, enter amount from line 3

**4a**

171,259

**Note:** If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.

**b** If you elect one or both of the optional methods, enter the total of lines 15 and 17 here

**4b**

**c** Combine lines 4a and 4b. If less than \$400, stop; you don't owe self-employment tax. **Exception:** If less than \$400 and you had church employee income, enter -0- and continue

**4c**

171,259

**5a** Enter your church employee income from Form W-2. See instructions for definition of church employee income

**5a**

**b** Multiply line 5a by 92.35% (0.9235). If less than \$100, enter -0-

**5b**

0

**6** Add lines 4c and 5b

**6**

171,259

**7** Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2023

**7**

160,200

**8a** Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$160,200 or more, skip lines 8b through 10, and go to line 11

**8a**

113,677

**b** Unreported tips subject to social security tax from Form 4137, line 10

**8b**

**c** Wages subject to social security tax from Form 8919, line 10

**8c**

**d** Add lines 8a, 8b, and 8c

**8d**

113,677

**9** Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11

**9**

46,523

**10** Multiply the smaller of line 6 or line 9 by 12.4% (0.124)

**10**

5,769

**11** Multiply line 6 by 2.9% (0.029)

**11**

4,967

**12** Self-employment tax. Add lines 10 and 11. Enter here and on Schedule 2 (Form 1040), line 4, or Form 1040-SS, Part I, line 3

**12**

10,736

**13** Deduction for one-half of self-employment tax.

Multiply line 12 by 50% (0.50). Enter the result here and on Schedule 1 (Form 1040), line 15

**13**

5,368

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

Schedule SE (Form 1040) 2023

**Part II Optional Methods To Figure Net Earnings** (see instructions)

<p><b>Farm Optional Method.</b> You may use this method <b>only</b> if (a) your gross farm income<sup>1</sup> wasn't more than \$9,840, or (b) your net farm profits<sup>2</sup> were less than \$7,103.</p>	
14	Maximum income for optional methods ..... <b>6,560</b>
15	Enter the <b>smaller</b> of: two-thirds ( $\frac{2}{3}$ ) of gross farm income <sup>1</sup> (not less than zero) or \$6,560. Also, include this amount on line 4b above .....
<p><b>Nonfarm Optional Method.</b> You may use this method <b>only</b> if (a) your net nonfarm profits<sup>3</sup> were less than \$7,103 and also less than 72.189% of your gross nonfarm income,<sup>4</sup> and (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years. <b>Caution:</b> You may use this method no more than five times.</p>	
16	Subtract line 15 from line 14 .....
17	Enter the <b>smaller</b> of: two-thirds ( $\frac{2}{3}$ ) of gross nonfarm income <sup>4</sup> (not less than zero) or the amount on line 16. Also, include this amount on line 4b above .....

<sup>1</sup> From Sch. F, line 9; and Sch. K-1 (Form 1065), box 14, code B.

<sup>2</sup> From Sch. F, line 34; and Sch. K-1 (Form 1065), box 14, code A — minus the amount you would have entered on line 1b had you not used the optional method.

<sup>3</sup> From Sch. C, line 31; and Sch. K-1 (Form 1065), box 14, code A.

<sup>4</sup> From Sch. C, line 7; and Sch. K-1 (Form 1065), box 14, code C.

Form **1116**

**Foreign Tax Credit**

(Individual, Estate, or Trust)

OMB No. 1545-0121

**2023**

Attachment Sequence No. **19**

Department of the Treasury  
Internal Revenue Service

Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.

Go to [www.irs.gov/Form1116](http://www.irs.gov/Form1116) for instructions and the latest information.

Name **Xavier Becerra**  
**Carolyn Reyes**

Identifying number as shown on page 1 of your tax return

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a  Section 951A category income
- b  Foreign branch category income
- c  Passive category income
- d  General category income
- e  Section 901(j) income
- f  Certain income re-sourced by treaty
- g  Lump-sum distributions

h Resident of (name of country) **US United States**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I Taxable Income or Loss From Sources Outside the United States (for category checked above)**

i Enter the name of the foreign country or U.S. possession	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	OC	B	
1a Gross income from sources within country shown above and of the type checked above (see instructions):	Various			
Dividend	4,162			1a 4,162
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions <input type="checkbox"/>				
<b>Deductions and losses (Caution: See instructions.):</b>				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions)	29,200			
b Other dedcs. (attach stmt.)				
c Add lines 3a and 3b	29,200			
d Gross foreign source income (see instructions)	8,543			
e Gross income from all sources (see instructions)	588,029			
f Divide line 3d by line 3e (see instructions)	0.0145			
g Multiply line 3c by line 3f	424			
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	424			6 424
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 3,738

**Part II Foreign Taxes Paid or Accrued (see instructions)**

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add cols. (q) through (t))
(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(q) Dividends		(r) Rents and royalties	(s) Interest			
A	1099 Tax					29				29
B										
C										

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 **8 29**

For Paperwork Reduction Act Notice, see instructions.

Xavier Becerra & Carolyn Reyes



Form 1116 (2023)

**Part III Figuring the Credit**

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	29	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. If you enter an amount on line 10 and you don't need to attach Schedule B, check here (see instructions) <input type="checkbox"/> (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	29	
12	Reduction in foreign taxes (see instructions)	12		
13	Taxes reclassified under high tax kickout (see instructions)	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		29
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions	15	3,738	
16	Adjustments to line 15 (see instructions)	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	3,738	
18	<b>Individuals:</b> Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption <b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	451,423	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		0.0083
20	<b>Individuals:</b> Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions. <b>Caution:</b> If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.	20		102,146
21	Multiply line 20 by line 19 (maximum amount of credit)	21		846
22	Increase in limitation (section 960 (c)) (see instructions)	22		
23	Add lines 21 and 22	23		846
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV See instructions	24		29

**Part IV Summary of Credits From Separate Parts III (see instructions)**

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31	32		
33	Enter the smaller of line 20 or line 32	33		29
34	Reduction of credit for international boycott operations. See instructions for line 12	34		
35	Subtract line 34 from line 33. This is your foreign tax credit. Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a	35		29

Form **1116**

Alt. Min. Tax  
**Foreign Tax Credit**  
(Individual, Estate, or Trust)

OMB No. 1545-0121

**2023**

Attachment Sequence No. **19**

Department of the Treasury  
Internal Revenue Service

Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.

Go to [www.irs.gov/Form1116](http://www.irs.gov/Form1116) for instructions and the latest information.

Name: **Xavier Becerra**  
**Carolyn Reyes**

Identifying number as shown on page 1 of your tax return: XXXXXXXXXX

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a  Section 951A category income    c  Passive category income    e  Section 901(j) income    g  Lump-sum distributions  
 b  Foreign branch category income    d  General category income    f  Certain income re-sourced by treaty

h Resident of (name of country) **US United States**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I Taxable Income or Loss From Sources Outside the United States** (for category checked above)

i Enter the name of the foreign country or U.S. possession	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	OC	C	
1a Gross income from sources within country shown above and of the type checked above (see instructions):  Dividend	Various			
		4,333		1a 4,333
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions <input type="checkbox"/>				
<b>Deductions and losses</b> (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions)				
b Other dedts. (attach stmt.)				
c Add lines 3a and 3b				
d Gross foreign source income (see instructions)		8,543		
e Gross income from all sources (see instructions)		588,029		
f Divide line 3d by line 3e (see instructions)		0.0145		
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5				6
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 4,333

**Part II Foreign Taxes Paid or Accrued** (see instructions)

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued							(u) Total foreign taxes paid or accrued (add cols. (q) through (t))	
		In foreign currency				In U.S. dollars				
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends	(r) Rents and royalties		(s) Interest
A	1099 Tax					29				29
B										
C										
8 Add lines A through C, column (u). Enter the total here and on line 9, page 2									8 29	

For Paperwork Reduction Act Notice, see Instructions.

Alt. Min. Tax

Xavier Becerra & Carolyn Reyes



Form 1116 (2023)

**Part III Figuring the Credit**

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	29	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. If you enter an amount on line 10 and you don't need to attach Schedule B, check here (see instructions) <input type="checkbox"/> (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	29	
12	Reduction in foreign taxes (see instructions)	12		
13	Taxes reclassified under high tax kickout (see instructions)	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		29
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions	15	4,333	
16	Adjustments to line 15 (see instructions)	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	4,333	
18	<b>Individuals:</b> Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption <b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	479,881	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		0.0090
20	<b>Individuals:</b> Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions. <b>Caution:</b> If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.	20		94,533
21	Multiply line 20 by line 19 (maximum amount of credit)	21		854
22	Increase in limitation (section 960 (c)) (see instructions)	22		
23	Add lines 21 and 22	23		854
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV See instructions	24		29

**Part IV Summary of Credits From Separate Parts III (see instructions)**

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31	32		
33	Enter the smaller of line 20 or line 32	33		29
34	Reduction of credit for international boycott operations. See instructions for line 12	34		
35	Subtract line 34 from line 33. This is your <b>foreign tax credit</b> . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a	35		29

Form **6251**

**Alternative Minimum Tax—Individuals**

OMB No. 1545-0074

**2023**

Attachment Sequence No. **32**

Department of the Treasury  
Internal Revenue Service

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

Go to [www.irs.gov/Form6251](http://www.irs.gov/Form6251) for instructions and the latest information.

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

Xavier Becerra & Carolyn Reyes

Your social security number

[REDACTED]

**Part I Alternative Minimum Taxable Income** (See instructions for how to complete each line.)

<b>1</b>	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract line 14 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	<b>1</b>	452,204
<b>2a</b>	If filing Schedule A (Form 1040), enter the taxes from Schedule A, line 7; otherwise, enter the amount from Form 1040 or 1040-SR, line 12	<b>2a</b>	29,200
<b>b</b>	Tax refund from Schedule 1 (Form 1040), line 1 or line 8z	<b>2b</b>	( )
<b>c</b>	Investment interest expense (difference between regular tax and AMT)	<b>2c</b>	( )
<b>d</b>	Depletion (difference between regular tax and AMT)	<b>2d</b>	( )
<b>e</b>	Net operating loss deduction from Schedule 1 (Form 1040), line 8a. Enter as a positive amount	<b>2e</b>	( )
<b>f</b>	Alternative tax net operating loss deduction	<b>2f</b>	( )
<b>g</b>	Interest from specified private activity bonds exempt from the regular tax	<b>2g</b>	( )
<b>h</b>	Qualified small business stock, see instructions	<b>2h</b>	( )
<b>i</b>	Exercise of incentive stock options (excess of AMT income over regular tax income)	<b>2i</b>	( )
<b>j</b>	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	<b>2j</b>	( )
<b>k</b>	Disposition of property (difference between AMT and regular tax gain or loss)	<b>2k</b>	( )
<b>l</b>	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	<b>2l</b>	( )
<b>m</b>	Passive activities (difference between AMT and regular tax income or loss)	<b>2m</b>	-913
<b>n</b>	Loss limitations (difference between AMT and regular tax income or loss)	<b>2n</b>	0
<b>o</b>	Circulation costs (difference between regular tax and AMT)	<b>2o</b>	( )
<b>p</b>	Long-term contracts (difference between AMT and regular tax income)	<b>2p</b>	( )
<b>q</b>	Mining costs (difference between regular tax and AMT)	<b>2q</b>	( )
<b>r</b>	Research and experimental costs (difference between regular tax and AMT)	<b>2r</b>	( )
<b>s</b>	Income from certain installment sales before January 1, 1987	<b>2s</b>	( )
<b>t</b>	Intangible drilling costs preference	<b>2t</b>	( )
<b>3</b>	Other adjustments, including income-based related adjustments	<b>3</b>	( )
<b>4</b>	<b>Alternative minimum taxable income.</b> Combine lines 1 through 3. (If married filing separately and line 4 is more than \$831,150, see instructions.)	<b>4</b>	480,491

**Part II Alternative Minimum Tax (AMT)**

<b>5</b>	Exemption. <table border="0"> <tr> <td><b>IF your filing status is...</b></td> <td><b>AND line 4 is not over...</b></td> <td><b>THEN enter on line 5...</b></td> <td></td> </tr> <tr> <td>Single or head of household</td> <td>\$ 578,150</td> <td>\$ 81,300</td> <td rowspan="3">}</td> </tr> <tr> <td>Married filing jointly or qualifying surviving spouse</td> <td>1,156,300</td> <td>126,500</td> </tr> <tr> <td>Married filing separately</td> <td>578,150</td> <td>63,250</td> </tr> </table> If line 4 is over the amount shown above for your filing status, see instructions.	<b>IF your filing status is...</b>	<b>AND line 4 is not over...</b>	<b>THEN enter on line 5...</b>		Single or head of household	\$ 578,150	\$ 81,300	}	Married filing jointly or qualifying surviving spouse	1,156,300	126,500	Married filing separately	578,150	63,250	<b>5</b>	126,500
<b>IF your filing status is...</b>	<b>AND line 4 is not over...</b>	<b>THEN enter on line 5...</b>															
Single or head of household	\$ 578,150	\$ 81,300	}														
Married filing jointly or qualifying surviving spouse	1,156,300	126,500															
Married filing separately	578,150	63,250															
<b>6</b>	Subtract line 5 from line 4. If more than zero, go to line 7. If zero or less, enter -0- here and on lines 7, 9, and 11, and go to line 10	<b>6</b>	353,991														
<b>7</b>	<ul style="list-style-type: none"> <li>If you are filing Form 2555, see instructions for the amount to enter.</li> <li>If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; you reported qualified dividends on Form 1040 or 1040-SR, line 3a; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 40 here.</li> <li><b>All others:</b> If line 6 is \$220,700 or less (\$110,350 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$4,414 (\$2,207 if married filing separately) from the result.</li> </ul>	<b>7</b>	94,533														
<b>8</b>	Alternative minimum tax foreign tax credit (see instructions)	<b>8</b>	29														
<b>9</b>	Tentative minimum tax. Subtract line 8 from line 7	<b>9</b>	94,504														
<b>10</b>	Add Form 1040 or 1040-SR, line 16 (minus any tax from Form 4972), and Schedule 2 (Form 1040), line 2. Subtract from the result Schedule 3 (Form 1040), line 1 and any negative amount reported on Form 8978, line 14 (treated as a positive number). If zero or less, enter -0-. If you used Schedule J to figure your tax on Form 1040 or 1040-SR, line 16, refigure that tax without using Schedule J before completing this line. See instructions	<b>10</b>	102,117														
<b>11</b>	<b>AMT.</b> Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1	<b>11</b>	0														

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

Form **6251** (2023)

Xavier Becerra & Carolyn Reyes

Form 6251 (2023)

Page 2

**Part III Tax Computation Using Maximum Capital Gains Rates**

Complete Part III only if you are required to do so by line 7 or by the Foreign Earned Income Tax Worksheet in the instructions.

12	Enter the amount from Form 6251, line 6. If you are filing Form 2555, enter the amount from line 3 of the worksheet in the instructions for line 7	12	353,991
13	Enter the amount from line 4 of the Qualified Dividends and Capital Gain Tax Worksheet in the Instructions for Form 1040 or the amount from line 13 of the Schedule D Tax Worksheet in the Instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	13	1,314
14	Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	14	
15	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 13. Otherwise, add lines 13 and 14, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555, see instructions for the amount to enter	15	1,314
16	Enter the smaller of line 12 or line 15	16	1,314
17	Subtract line 16 from line 12	17	352,677
18	If line 17 is \$220,700 or less (\$110,350 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract \$4,414 (\$2,207 if married filing separately) from the result	18	94,336
19	Enter: <ul style="list-style-type: none"> <li>• \$89,250 if married filing jointly or qualifying surviving spouse,</li> <li>• \$44,625 if single or married filing separately, or</li> <li>• \$59,750 if head of household.</li> </ul>	19	89,250
20	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 14 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	20	450,890
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	0
22	Enter the smaller of line 12 or line 13	22	1,314
23	Enter the smaller of line 21 or line 22. This amount is taxed at 0%	23	
24	Subtract line 23 from line 22	24	1,314
25	Enter: <ul style="list-style-type: none"> <li>• \$492,300 if single,</li> <li>• \$276,900 if married filing separately,</li> <li>• \$553,850 if married filing jointly or qualifying surviving spouse, or</li> <li>• \$523,050 if head of household.</li> </ul>	25	553,850
26	Enter the amount from line 21	26	0
27	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 21 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	27	450,890
28	Add line 26 and line 27	28	450,890
29	Subtract line 28 from line 25. If zero or less, enter -0-	29	102,960
30	Enter the smaller of line 24 or line 29	30	1,314
31	Multiply line 30 by 15% (0.15)	31	197
32	Add lines 23 and 30 If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33.	32	1,314
33	Subtract line 32 from line 22	33	0
34	Multiply line 33 by 20% (0.20) If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35.	34	
35	Add lines 17, 32, and 33	35	
36	Subtract line 35 from line 12	36	
37	Multiply line 36 by 25% (0.25)	37	
38	Add lines 18, 31, 34, and 37	38	94,533
39	If line 12 is \$220,700 or less (\$110,350 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract \$4,414 (\$2,207 if married filing separately) from the result	39	94,703
40	Enter the smaller of line 38 or line 39 here and on line 7. If you are filing Form 2555, do not enter this amount on line 7. Instead, enter it on line 4 of the worksheet in the instructions for line 7	40	94,533

Form **8995-A**

**Qualified Business Income Deduction**

OMB No. 1545-2294

**2023**

Attachment Sequence No. **55A**

Department of the Treasury  
Internal Revenue Service

Attach to your tax return.

Go to [www.irs.gov/Form8995A](http://www.irs.gov/Form8995A) for instructions and the latest information.

Name(s) shown on return

Xavier Becerra & Carolyn Reyes

Your taxpayer identification number

**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 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 above \$182,100 (\$364,200 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

**Part I Trade, Business, or Aggregation Information**

Complete Schedules A, B, and/or C (Form 8995-A), as applicable, before starting Part I. Attach additional worksheets when needed. See instructions.

1	(a) Trade, business, or aggregation name	(b) Check if specified service	(c) Check if aggregation	(d) Taxpayer identification number	(e) Check if patron
A	S.F.R.-Mooney	<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>
B	SFR-Hill	<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>
C	SFR-[REDACTED]	<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>

**Part II Determine Your Adjusted Qualified Business Income**

	A	B	C
2 Qualified business income from the trade, business, or aggregation. See instructions	20,687	54,974	5,029
3 Multiply line 2 by 20% (0.20). If your taxable income is \$182,100 or less (\$364,200 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	4,137	10,995	1,006
4 Allocable share of W-2 wages from the trade, business, or aggregation	0	0	0
5 Multiply line 4 by 50% (0.50)	0	0	0
6 Multiply line 4 by 25% (0.25)	0	0	0
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	48,866	152,846	249,885
8 Multiply line 7 by 2.5% (0.025)	1,222	3,821	6,247
9 Add lines 6 and 8	1,222	3,821	6,247
10 Enter the greater of line 5 or line 9	1,222	3,821	6,247
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	1,222	3,821	1,006
12 Phased-in reduction. Enter the amount from line 26, if any	1,350	4,136	
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	1,350	4,136	1,006
14 Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions			
15 Qualified business income component. Subtract line 14 from line 13	1,350	4,136	1,006
16 Total qualified business income component. Add all amounts reported on line 15	7,437		

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Form **8995-A** (2023)

Xavier Becerra & Carolyn Reyes

Form 8995-A (2023)

**Part III Phased-in Reduction**

Complete Part III only if your taxable income is more than \$182,100 but not \$232,100 (\$364,200 and \$464,200 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

		A	B	C
17	Enter the amounts from line 3	17	4,137	10,995
18	Enter the amounts from line 10	18	1,222	3,821
19	Subtract line 18 from line 17	19	2,915	7,174
20	Taxable income before qualified business income deduction	20	459,814	
21	Threshold. Enter \$182,100 (\$364,200 if married filing jointly)	21	364,200	
22	Subtract line 21 from line 20	22	95,614	
23	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	23	100,000	
24	Phase-in percentage. Divide line 22 by line 23	24	95.6140 %	
25	Total phase-in reduction. Multiply line 19 by line 24	25	2,787	6,859
26	Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business	26	1,350	4,136

**Part IV Determine Your Qualified Business Income Deduction**

27	Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16	27	7,437	
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions	28	866	
29	Qualified REIT dividends and PTP (loss) carryforward from prior years	29	( )	
30	Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0-	30	866	
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	173	
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		7,610
33	Taxable income before qualified business income deduction	33	459,814	
34	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	34	1,314	
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		458,500
36	Income limitation. Multiply line 35 by 20% (0.20)	36		91,700
37	Qualified business income deduction before the domestic production activities deduction (DPAD) under section 199A(g). Enter the smaller of line 32 or line 36	37		7,610
38	DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don't enter more than line 33 minus line 37	38		
39	Total qualified business income deduction. Add lines 37 and 38	39		7,610
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40	( )	0

Form 8995-A (2023)

Form **8995-A**

**Qualified Business Income Deduction**

OMB No. 1545-2294

**2023**

Attachment Sequence No. **55A**

Department of the Treasury  
Internal Revenue Service

Attach to your tax return.

Go to [www.irs.gov/Form8995A](http://www.irs.gov/Form8995A) for instructions and the latest information.

Name(s) shown on return

Xavier Becerra & Carolyn Reyes

Your taxpayer identification number

[REDACTED]

**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 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 above \$182,100 (\$364,200 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

**Part I Trade, Business, or Aggregation Information**

Complete Schedules A, B, and/or C (Form 8995-A), as applicable, before starting Part I. Attach additional worksheets when needed. See instructions.

1	(a) Trade, business, or aggregation name	(b) Check if specified service	(c) Check if aggregation	(d) Taxpayer identification number	(e) Check if patron
A	SFR-[REDACTED]	<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>
B	Director Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>
C		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

**Part II Determine Your Adjusted Qualified Business Income**

	A	B	C
2 Qualified business income from the trade, business, or aggregation. See instructions	4,381	7,898	
3 Multiply line 2 by 20% (0.20). If your taxable income is \$182,100 or less (\$364,200 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	876	1,580	
4 Allocable share of W-2 wages from the trade, business, or aggregation	0	0	
5 Multiply line 4 by 50% (0.50)	0	0	
6 Multiply line 4 by 25% (0.25)	0	0	
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	281,785	0	
8 Multiply line 7 by 2.5% (0.025)	7,045	0	
9 Add lines 6 and 8	7,045	0	
10 Enter the greater of line 5 or line 9	7,045	0	
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	876	0	
12 Phased-in reduction. Enter the amount from line 26, if any		69	
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	876	69	
14 Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions			
15 Qualified business income component. Subtract line 14 from line 13	876	69	
16 Total qualified business income component. Add all amounts reported on line 15			

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Form **8995-A** (2023)

Xavier Becerra & Carolyn Reyes

Form 8995-A (2023)

Page 2

**Part III Phased-in Reduction**

Complete Part III only if your taxable income is more than \$182,100 but not \$232,100 (\$364,200 and \$464,200 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

		A	B	C
17	Enter the amounts from line 3	17	1,580	
18	Enter the amounts from line 10	18		
19	Subtract line 18 from line 17	19	1,580	
20	Taxable income before qualified business income deduction	20	459,814	
21	Threshold. Enter \$182,100 (\$364,200 if married filing jointly)	21	364,200	
22	Subtract line 21 from line 20	22	95,614	
23	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	23	100,000	
24	Phase-in percentage. Divide line 22 by line 23	24	95.6140 %	
25	Total phase-in reduction. Multiply line 19 by line 24	25	1,511	
26	Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business	26		69

**Part IV Determine Your Qualified Business Income Deduction**

27	Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16	27		
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions	28		
29	Qualified REIT dividends and PTP (loss) carryforward from prior years	29		
30	Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0-	30		
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31		
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		
33	Taxable income before qualified business income deduction	33		
34	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	34		
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		
36	Income limitation. Multiply line 35 by 20% (0.20)	36		
37	Qualified business income deduction before the domestic production activities deduction (DPAD) under section 199A(g). Enter the smaller of line 32 or line 36	37		
38	DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don't enter more than line 33 minus line 37	38		
39	Total qualified business income deduction. Add lines 37 and 38	39		
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40		

Form 8995-A (2023)

**SCHEDULE A**  
**(Form 8995-A)**

**Specified Service Trades or Businesses**

OMB No. 1545-2294

**2023**

Attachment  
Sequence No. **55B**

Department of the Treasury  
Internal Revenue Service

Attach to Form 8995-A.

Go to [www.irs.gov/Form8995A](http://www.irs.gov/Form8995A) for instructions and the latest information.

Name(s) shown on return

Xavier Becerra & Carolyn Reyes

Your taxpayer identification number

Complete Schedule A only if your trade or business is a specified service trade or business (see instructions) and your taxable income is more than \$182,100 but not \$232,100 (\$364,200 and \$464,200 if married filing jointly). If your taxable income isn't more than \$182,100 (\$364,200 if married filing jointly) and you're not a patron of an agricultural or horticultural cooperative, don't file this form; instead, file Form 8995, Qualified Business Income Deduction Simplified Computation. Otherwise, complete Schedule D (Form 8995-A) before beginning Schedule A. If your taxable income is more than \$232,100 (\$464,200 if married filing jointly), your specified service trade or business doesn't qualify for the deduction. If you have more than three trades or businesses, attach as many Schedules A as needed. See instructions.

**Part I Other Than Publicly Traded Partnerships (PTP)**

See instructions before completing Parts I and II.

		A	B	C
1a	Trade or business name	Director Ser		
b	Taxpayer identification number			
2	Qualified business income or (loss) from the trade or business	180,078		
3	Allocable share of W-2 wages from the trade or business			
4	Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property			
5	Taxable income before qualified business income deduction	459,814		
6	Threshold. Enter \$182,100 (\$364,200 if married filing jointly)	364,200		
7	Subtract line 6 from line 5	95,614		
8	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	100,000		
9	Divide line 7 by line 8	95.6140		
10	Applicable percentage. Subtract line 9 from 100%	4.3860 %		
11	Applicable percentage of qualified business income or (loss). Multiply line 2 by line 10. Enter this amount on Schedule C (Form 8995-A) or on Form 8995-A, line 2, for the corresponding trade or business, as appropriate	7,898		
12	Applicable percentage of W-2 wages. Multiply line 3 by line 10. Enter this amount on Form 8995-A, line 4, for the corresponding trade or business, as appropriate			
13	Applicable percentage of the UBIA of qualified property. Multiply line 4 by line 10. Enter this amount on Form 8995-A, line 7, for the corresponding trade or business, as appropriate			

**Part II Publicly Traded Partnership**

		A	B	C
14	Trade or business name			
15	Taxpayer identification number			
16	Qualified PTP income or (loss)			
17	Total PTP specified service trade or business (SSTB) income or (loss). Combine all amounts on line 16			
18	Taxable income before qualified business income deduction			
19	Threshold. Enter \$182,100 (\$364,200 if married filing jointly)			
20	Subtract line 19 from line 18			
21	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)			
22	Divide line 20 by line 21			
23	Applicable percentage. Subtract line 22 from 100%			%
24	Applicable percentage of qualified PTP income or (loss). Multiply line 17 by line 23. Include this amount on Form 8995-A, line 28			

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Schedule A (Form 8995-A) 2023

2023

Attachment Sequence No. 71

Form 8959

Additional Medicare Tax

If any line does not apply to you, leave it blank. See separate instructions.

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

Go to www.irs.gov/Form8959 for instructions and the latest information.

Department of the Treasury Internal Revenue Service

Name(s) shown on return

Xavier Becerra & Carolyn Reyes

Your social security number

Part I Additional Medicare Tax on Medicare Wages

Table with 7 rows for Medicare wages and tips. Line 1: 311,921; Line 4: 311,921; Line 5: 250,000; Line 6: 61,921; Line 7: 557.

Part II Additional Medicare Tax on Self-Employment Income

Table with 13 rows for self-employment income. Line 8: 171,259; Line 9: 250,000; Line 10: 311,921; Line 11: 0; Line 12: 171,259; Line 13: 1,541.

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RRTA) Compensation

Table with 17 rows for RRTA compensation. Line 14: 0; Line 15: 250,000; Line 16: 0; Line 17: 0.

Part IV Total Additional Medicare Tax

Table with 18 rows. Line 18: 2,098.

Part V Withholding Reconciliation

Table with 24 rows for withholding reconciliation. Line 19: 4,523; Line 20: 311,921; Line 21: 4,523; Line 22: 0; Line 24: 0.

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

Form 8959 (2023)

Form **8960**

**Net Investment Income Tax—  
Individuals, Estates, and Trusts**

OMB No. 1545-2227

**2023**

Attachment Sequence No. **72**

Department of the Treasury  
Internal Revenue Service

Go to [www.irs.gov/Form8960](http://www.irs.gov/Form8960) for instructions and the latest information.

Name(s) shown on your tax return

Xavier Becerra & Carolyn Reyes

Your social security number or EIN

**Part I Investment Income**

- Section 6013(g) election (see instructions)
- Section 6013(h) election (see instructions)
- Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions)		1	856
2	Ordinary dividends (see instructions)		2	4,943
3	Annuities (see instructions)		3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions)	4a 270,517	4c	85,071
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b -185,446		
c	Combine lines 4a and 4b			
5a	Net gain or loss from disposition of property (see instructions)	5a -3,000	5d	-3,000
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b		
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c		
d	Combine lines 5a through 5c			
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)		6	
7	Other modifications to investment income (see instructions)		7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7		8	87,870

**Part II Investment Expenses Allocable to Investment Income and Modifications**

9a	Investment interest expenses (see instructions)	9a	9d	
b	State, local, and foreign income tax (see instructions)	9b		
c	Miscellaneous investment expenses (see instructions)	9c		
d	Add lines 9a, 9b, and 9c			
10	Additional modifications (see instructions)		10	
11	Total deductions and modifications. Add lines 9d and 10		11	

**Part III Tax Computation**

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13-17. Estates and trusts, complete lines 18a-21. If zero or less, enter -0-		12	87,870
<b>Individuals:</b>				
13	Modified adjusted gross income (see instructions)	13 489,014	16	87,870
14	Threshold based on filing status (see instructions)	14 250,000		
15	Subtract line 14 from line 13. If zero or less, enter -0-	15 239,014		
16	Enter the smaller of line 12 or line 15			
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). Enter here and include on your tax return (see instructions)		17	3,339
<b>Estates and Trusts:</b>				
18a	Net investment income (line 12 above)	18a	18c	
b	Deductions for distributions of net investment income and charitable deductions (see instructions)	18b		
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-			
19a	Adjusted gross income (see instructions)	19a	19c	
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b		
c	Subtract line 19b from line 19a. If zero or less, enter -0-			
20	Enter the smaller of line 18c or line 19c		20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions)		21	

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

Form **8960** (2023)

Form **1040** | **Tax Return Reconciliation Worksheet** | **2023**

Filing Status:  1 Single  2 Married filing jointly  3 Married filing separately  4 Head of household\*  5 Qualifying widow(er)\*  
 MFS spouse name: \_\_\_\_\_ \*Qualifying person that is a child but not a dependent:

Taxpayer first name and initial <b>Xavier</b>	Last name <b>Becerra</b>	Taxpayer social security number [REDACTED]
If a joint return, spouse's first name and initial <b>Carolyn</b>	Last name <b>Reyes</b>	Spouse's social security number [REDACTED]
Home address (number and street). If you have a P.O. box, see instructions. [REDACTED]		Apt. no. _____
City, town or post office, state, and ZIP code. [REDACTED]		Presidential Election Campaign <input checked="" type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse
Foreign country name [REDACTED]	Foreign province/state/county [REDACTED]	Foreign postal code [REDACTED]

At anytime during 2023, did you receive, sell, send, exchange, or otherwise acquire financial interest in any digital assets? Yes  No

<b>6a</b> <input checked="" type="checkbox"/> Taxpayer. If someone can claim you as a dependent, do not check box 6a <b>b</b> <input checked="" type="checkbox"/> Spouse	Boxes checked on 6a and 6b ..... <u>2</u> Children on 6c who lived with you ..... _____ Children on 6c who did not live with you ..... _____ Dependents on 6c not entered above ..... <u>1</u> Total. Add lines above ..... <u>3</u>
---	--

6c Dependents:				(4) If qualifies for		If more than four dependents, here <input type="checkbox"/>
(1) First name	Last name	(2) Social security number	(3) Relationship to you	Child tax credit	Other dependents	
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]		<input checked="" type="checkbox"/>	

<b>Income</b> (Schedule 1)	7 Wages, salaries, tips, etc. Attach Form(s) W-2 ..... <b>7</b> 221,066 8a Taxable interest. Attach Schedule B if required ..... <b>8a</b> 856 b Tax-exempt interest. Do not include on line 8a ..... <b>8b</b> _____ 9a Ordinary dividends. Attach Schedule B if required ..... <b>9a</b> 4,943 b Qualified dividends ..... <b>9b</b> 1,314 10 Taxable refunds, credits, or offsets of state and local income taxes ..... <b>10</b> _____ 11 Alimony received ..... <b>11</b> _____ 12 Business income or (loss). Attach Schedule C or C-EZ ..... <b>12</b> 185,446 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/> ..... <b>13</b> -3,000 14 Other gains or (losses). Attach Form 4797 ..... <b>14</b> _____ 15a IRA distributions ..... <b>15a</b> _____ <b>b Taxable amount</b> ..... <b>15b</b> _____ 16a Pensions and annuities ..... <b>16a</b> _____ <b>b Taxable amount</b> ..... <b>16b</b> _____ 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E ..... <b>17</b> 85,071 18 Farm income or (loss). Attach Schedule F ..... <b>18</b> _____ 19 Unemployment compensation ..... <b>19</b> _____ 20a Social security benefits ..... <b>20a</b> _____ <b>b Taxable amount</b> ..... <b>20b</b> _____ 21 Other income. List type and amount ..... <b>21</b> _____ 22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ..... <b>22</b> 494,382
<b>Adjusted Gross Income</b> (Schedule 1)	23 Educator expenses ..... <b>23</b> _____ 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ ..... <b>24</b> _____ 25 Health savings account deduction. Attach Form 8889 ..... <b>25</b> _____ 26 Moving expenses. Attach Form 3903 ..... <b>26</b> _____ 27 Deductible part of self-employment tax. Attach Schedule SE ..... <b>27</b> 5,368 28 Self-employed SEP, SIMPLE, and qualified plans ..... <b>28</b> _____ 29 Self-employed health insurance deduction ..... <b>29</b> _____ 30 Penalty on early withdrawal of savings ..... <b>30</b> _____ 31a Alimony paid b Recipient's SSN ..... <b>31a</b> _____ 32 IRA deduction ..... <b>32</b> _____ 33 Student loan interest deduction ..... <b>33</b> _____ 34 Reserved for future use ..... <b>34</b> _____ 35 Reserved for future use ..... <b>35</b> _____ 36 Add lines 23 through 35 ..... <b>36</b> 5,368 37 Subtract line 36 from line 22. This is your adjusted gross income ..... <b>37</b> 489,014

Form **1040** Tax Return Reconciliation Worksheet, Page 2 **2023**

Name **Xavier Becerra & Carolyn Reyes** Tp TIN **[REDACTED]**

**38** Amount from line 37 (adjusted gross income) **38** **489,014**  
**39a** Check  You were born before January 2,1959,  Blind. } Total boxes  
if:  Spouse was born before January 2,1959,  Blind. } checked ▶ **39a** **1**

**40** Itemized deductions (from Schedule A) or your standard deduction (see left margin) **40** **29,200**

**41** Subtract line 40 and 40b from line 38 **41** **459,814**

**42** Qualified business income deduction (see instructions) **42** **7,610**

**43** Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0- **43** **452,204**

**44** Tax (see Instr.). Check if any from: a  Form(s) 8814 b  Form 4972 c  **44** **102,146**

**45** Alternative minimum tax (see instructions). Attach Form 6251 **45**

**46** Excess advance premium tax credit repayment. Attach Form 8962 **46**

**47** Add lines 44, 45, and 46 ▶ **47** **102,146**

**48** Foreign tax credit. Attach Form 1116 if required **48** **29**

**49** Credit for child and dependent care expenses. Attach Form 2441 **49**

**50** Education credits from Form 8863, line 19 **50**

**51** Retirement savings contributions credit. Attach Form 8880 **51**

**52** Child tax credit/credit for other dependents **52**

**53** Residential energy credits. Attach Form 5695 **53**

**54** Other credits from Form: a  3800 b  8801 c  **54**

**55** Add lines 48 through 54. These are your total credits **55** **29**

**56** Subtract line 55 from line 47. If line 55 is more than line 47, enter -0- ▶ **56** **102,117**

**57** Self-employment tax. Attach Schedule SE **57** **10,736**

**58** Unreported social security and Medicare tax from Form: a  4137 b  8919 **58**

**59** Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required **59**

**60a** Household employment taxes from Schedule H **60a**

b First-time homebuyer credit repayment. Attach Form 5405 if required **60b**

**61** Taxes from: a  Form 8959 b  Form 8960 c  Instructions; enter code(s) See Statement **61** **5,437**

**62** Section 965 net tax liability installment from Form 965-A **62**

**63** Add lines 56 through 61. This is your total tax ▶ **63** **118,290**

**64** Federal income tax withheld from: **64a** **27,403**

a Form(s) W-2 **64b**

b Form(s) 1099 **64c**

c Other forms **65** **76,000**

**66** 2023 estimated tax payments and amount applied from 2022 return **66**

**67** Earned income credit (EIC) **67**

**68** Additional child tax credit. Attach Schedule 8812 **68**

**69** American opportunity credit from Form 8863, line 8 **69**

**70** Recovery rebate credit **70**

**71** Net premium tax credit. Attach Form 8962 **71**

**72** Amount paid with request for extension to file **72**

**73** Excess social security and tier 1 RRTA tax withheld **73**

**74** Credit for federal tax on fuels. Attach Form 4136 **74**

**75** Other payments and refundable credits **75** **103,403**

**76** Total pymts. Add lines 64 - 74. **76** **103,403**

**Refund** **76** If line 75 is more than line 63, subtract line 63 from line 75. This is the amount you overpaid **76**

**77a** Amount of line 76 you want refunded to you. If Form 8888 is attached, check here ▶  **77a**

▶ **b** Routing number  ▶ **c** Type:  Checking  Savings

▶ **d** Account number

**78** Amount of line 76 you want applied to your 2024 estimated tax ▶ **78**

**Amount You Owe** **79** Amount you owe. Subtract line 75 from line 63. For details on how to pay, see instructions ▶ **79** **15,917**

**80** Estimated tax penalty (see instructions) **80** **1,030**

**Int/Pen** Date filed Int Fail to file Fail to pay Total  
Do you want to allow another person to discuss this return with the IRS (see instructions)?  Yes. Complete below.  No Personal identification no. (PIN) ▶ **[REDACTED]**

**Third Party Designee** Designee's Name ▶ **Robert J. Herrera, EA** Phone no. ▶ **[REDACTED]**

**Other Info** Taxpayer Daytime phone number Taxpayer: Occupation **US HHS Secretary** IRS Identity Protection PIN  
Spouse: Occupation **Physician** IRS Identity Protection PIN

Taxpayer  Spouse Email address

**Federal Statements****S.F.R.-Mooney****Statement 1 - Schedule E, Line 19 - Other Expenses**

<u>Description</u>	<u>Gross Amount</u>	<u>Business Use Percentage</u>	<u>Net Amount</u>
Gardening	\$ 960		\$ 960
Total	\$ 960		\$ 960

**SFR-Hill****Statement 2 - Schedule E, Line 19 - Other Expenses**

<u>Description</u>	<u>Gross Amount</u>	<u>Business Use Percentage</u>	<u>Net Amount</u>
Amortization	\$ 252		\$ 252
Gardening	2,800		2,800
Repairs-Shower Door	160		160
Repairs-Door	80		80
Total	\$ 3,292		\$ 3,292

**SFR- [REDACTED]****Statement 3 - Schedule E, Line 19 - Other Expenses**

<u>Description</u>	<u>Gross Amount</u>	<u>Business Use Percentage</u>	<u>Net Amount</u>
Amortization	\$ 652		\$ 652
Association Dues	4,284		4,284
Rental Inspection Fees	16		16
Repairs-Garage Door	75		75
Total	\$ 5,027		\$ 5,027

**Federal Statements**

SFR- [REDACTED]

**Statement 4 - Schedule E. Line 19 - Other Expenses**

<u>Description</u>	<u>Gross Amount</u>	<u>Business Use Percentage</u>	<u>Net Amount</u>
Amortization	\$ 118		\$ 118
Association Dues	1,416		1,416
Rental Inspection Fees	16		16
Total	<u>\$ 1,550</u>		<u>\$ 1,550</u>