

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning 2023, ending 2023, ending 2023

See separate instructions.

Your first name and middle initial: Randall S; Last name: Richardson; Your social security number: [redacted]

If joint return, spouse's first name and middle initial: Gretha C; Last name: Solorzano; Spouse's social security number: [redacted]

Home address (number and street): [redacted]; Apt. no.: [redacted]; Presidential Election Campaign: [redacted]

City, town, or post office: [redacted]; State: [redacted]; ZIP code: [redacted]; Foreign country name: [redacted]; Foreign province/state/country: [redacted]; Foreign postal code: [redacted]

Filing Status: [X] Married filing jointly (even if only one had income); [ ] Single; [ ] Married filing separately (MFS); [ ] Head of household (HOH); [ ] Qualifying surviving spouse (QSS)

Digital Assets: At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset... [ ] Yes [X] No

Standard Deduction: Someone can claim: [ ] You as a dependent; [ ] Your spouse as a dependent; [ ] Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness: You: [ ] Were born before January 2, 1959; [ ] Are blind; Spouse: [ ] Was born before January 2, 1959; [ ] Is blind

Table with 5 columns: (1) First name, Last name, (2) Social security number, (3) Relationship to you, (4) Check the box if qualifies for (see instructions). Includes rows for dependents.

Main income table with columns for line numbers and amounts. Includes sections for Income, Tax-exempt interest, Qualified dividends, IRA distributions, Pensions and annuities, Social security benefits, Capital gain or (loss), Additional income from Schedule 1, Adjustments to income from Schedule 1, Standard deduction or itemized deductions, Qualified business income deduction, and Taxable income.

<b>Tax and Credits</b>	<b>16</b> Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4072 3 <input type="checkbox"/>	<b>16</b>	38,987
	<b>17</b> Amount from Schedule 2, line 3	<b>17</b>	0
	<b>18</b> Add lines 16 and 17	<b>18</b>	38,987
	<b>19</b> Child tax credit or credit for other dependents from Schedule 8812	<b>19</b>	
	<b>20</b> Amount from Schedule 3, line 8	<b>20</b>	248
	<b>21</b> Add lines 19 and 20	<b>21</b>	248
	<b>22</b> Subtract line 21 from line 18. If zero or less, enter -0-	<b>22</b>	38,739
	<b>23</b> Other taxes, including self-employment tax, from Schedule 2, line 21	<b>23</b>	0
<b>24</b> Add lines 22 and 23. This is your total tax	<b>24</b>	38,739	

<b>Payments</b>	<b>25</b> Federal income tax withheld from:			
	a Form(s) W-2	<b>25a</b>	28,070	
	b Form(s) 1099	<b>25b</b>	7,580	
	c Other forms (see instructions)	<b>25c</b>	0	
	d Add lines 25a through 25c	<b>25d</b>	35,650	
	<b>26</b> 2023 estimated tax payments and amount applied from 2022 return	<b>26</b>	0	
	<b>27</b> Earned income credit (EIC)	<b>27</b>		
	<b>28</b> Additional child tax credit from Schedule 8812	<b>28</b>		
	<b>29</b> American opportunity credit from Form 8883, line 8	<b>29</b>		
	<b>30</b> Reserved for future use	<b>30</b>		
	<b>31</b> Amount from Schedule 3, line 15	<b>31</b>	0	
	<b>32</b> Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	<b>32</b>	0	
<b>33</b> Add lines 25d, 26, and 32. These are your total payments	<b>33</b>	35,650		

If you have a qualifying child, attach Sch. EIC.

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

<b>Amount You Owe</b>	<b>37</b> 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	<b>37</b>	3,089
	<b>38</b> Estimated tax penalty (see instructions)	<b>38</b>	0

**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 \_\_\_\_\_ 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 Software Development	If the IRS sent you an Identity Protection PIN, enter it here (see Inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation Retired	If the IRS sent your spouse an Identity Protection PIN, enter it here (see Inst.)

Phone no. [REDACTED] Email address [REDACTED]

**Paid Preparer Use Only**

Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed
Firm's name			Phone no.	
Firm's address			Firm's EIN	

**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

Randall S Richardson

Your social security number

[REDACTED]

**Nonrefundable Credits**

1	Foreign tax credit. Attach Form 1116 if required		1	248
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	0
4	Retirement savings contributions credit. Attach Form 8880		4	0
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	0	
b	Credit for prior year minimum tax. Attach Form 8801	6b	0	
c	Adoption credit. Attach Form 8839	6c	0	
d	Credit for the elderly or disabled. Attach Schedule R	6d	0	
e	Reserved for future use	6e		
f	Clean vehicle credit. Attach Form 8936	6f	0	
g	Mortgage interest credit. Attach Form 8396	6g	0	
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h	0	
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	0	
z	Other nonrefundable credits. List type and amount: _____	6z		
7	Total other nonrefundable credits. Add lines 6a through 6z		7	0
8	Add lines 1 through 4, 5a, 5b, and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20		8	248

(continued on page 2)

**Other Payments and Refundable Credits**

9	Net premium tax credit. Attach Form 8962		9	
10	Amount paid with request for extension to file (see instructions)		10	
11	Excess social security and tier 1 RRTA tax withheld		11	0
12	Credit for federal tax on fuels. Attach Form 4136		12	
13	Other payments or refundable credits:			
a	Form 2439	13a		0
b	Credit for repayment of amounts included in income from earlier years	13b		
c	Elective payment election amount from Form 3800, Part III, line 6, column (i)	13c		0
d	Deferred amount of net 965 tax liability (see instructions)	13d		
z	Other payments or refundable credits. List type and amount: _____	13z		0
14	Total other payments or refundable credits. Add lines 13a through 13z		14	0
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31		15	0

**SCHEDULE D**  
(Form 1040)

**Capital Gains and Losses**

OMB No. 1545-0074

**2023**

Attachment  
Sequence No. 12

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.

Name(s) shown on return

Your social security number

Randall S Richardson

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.

**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	0	0		0
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked	0	0	0	0
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked	0	0	0	0
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked	5,086	3,585	0	1,501
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4 0
<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 ( 0)
<b>7</b> Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7 1,501

**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	0	0		0
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked	0	0	0	0
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked	0	0	0	0
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked	987	1,189	0	-202
<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 0
<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 0
<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 ( 0)
<b>15</b> Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2				15 -202

Summary

16 Combine lines 7 and 15 and enter the result

16

1,299

- If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.
- If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.
- If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.

17 Are lines 15 and 16 both gains?

- Yes. Go to line 18.
- No. Skip lines 18 through 21, and go to line 22.

18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet

18

19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet

19

20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952?

- Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040, line 16. Don't complete lines 21 and 22 below.
- No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.

21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:

- The loss on line 16; or
- (\$3,000), or if married filing separately, (\$1,500)

21 ( )

Note: When figuring which amount is smaller, treat both amounts as positive numbers.

22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?

- Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040, line 16.
- No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.



Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on Page 1  
 Randall S Richardson Social security number or taxpayer identification number

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

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

**Note:** You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You **must** check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
- (F) Long-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 (f) 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		
	26 AVEVA shares	08/18/21	01/31/23	987	1,189		D	-202	
								0	
								0	
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								0	
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) . . . . .				987	1,189		0	-202

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