

For the year Jan. 1-Dec. 31, 2024, or other tax year beginning \_\_\_\_\_, 2024, ending \_\_\_\_\_ 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). If you have a P.O. box, see instructions. [REDACTED]		Apt. no. [REDACTED]
City, town, or post office. If you have a foreign address, also complete spaces below. [REDACTED]		State [REDACTED]
Foreign country name [REDACTED]		Foreign province/state/country [REDACTED]
Foreign postal code [REDACTED]		Foreign ZIP code [REDACTED]

Presidential Election Campaign  
 Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.  
 You  Spouse

**Filing Status** Check only one box.

Single  Head of household (HOH)  
 Married filing jointly (even if only one had income)  
 Married filing separately (MFS)  Qualifying surviving spouse (QSS)  
 If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person a child but not your dependent.  
 If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required):

**Digital Assets** At any time during 2024, 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 (or a financial interest in a digital asset)? (See instructions.)  Yes  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, 1964  Are blind Spouse:  Was born before January 2, 1964  Is blind

**Dependents** (see instructions):

	(1) First name		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions)	
	Last name				Child tax credit	Credit for other dependents
if more than four dependents, see instructions and check here. . . . <input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

<b>Income</b> Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.	1a Total amount from Form(s) W-2, box 1 (see instructions)	1a	181,156
	b Household employee wages not reported on Form(s) W-2	1b	
	c Tip income not reported on line 1a (see instructions)	1c	
	d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
	e Taxable dependent care benefits from Form 2441, line 26	1e	
	f Employer-provided adoption benefits from Form 8839, line 29	1f	
	g Wages from Form 8919, line 6	1g	
	h Other earned income (see instructions)	1h	0
	i Nontaxable combat pay election (see instructions)	1i	
	z Add lines 1a through 1h	1z	181,156
	2a Tax-exempt interest	2a	20
	3a Qualified dividends	3a	7,201
	4a IRA distributions	4a	
	5a Pensions and annuities	5a	
	6a Social security benefits	6a	31,620
b Taxable interest	2b	2,501	
b Ordinary dividends	3b	7,322	
b Taxable amount	4b	72,000	
b Taxable amount	5b	21,684	
b Taxable amount	6b	26,877	
c If you elect to use the lump-sum election method, check here (see instructions)		<input type="checkbox"/>	
7 Capital gain or (loss). Attach Schedule D if required. If not required, check here	7	12,856	
8 Additional income from Schedule 1, line 10	8	0	
9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9	324,396	
10 Adjustments to income from Schedule 1, line 26	10	0	
11 Subtract line 10 from line 9. This is your adjusted gross income	11	324,396	
12 Standard deduction or itemized deductions (from Schedule A)	12	29,200	
13 Qualified business income deduction from Form 8995 or Form 8995-A	13	5	
14 Add lines 12 and 13	14	29,205	
15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15	295,191	

<b>Tax and Credits</b>	16	Tax (see instructions). Check if any from Form 8814 <input type="checkbox"/> 2 <input type="checkbox"/> 4972 <input type="checkbox"/> 3 <input type="checkbox"/>	16	55,217
	17	Amount from Schedule 2, line 3	17	0
	18	Add lines 16 and 17	18	55,217
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	281
	21	Add lines 19 and 20	21	281
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	54,936
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	862
24	Add lines 22 and 23. This is your total tax	24	55,798	

<b>Payments</b>	25	Federal income tax withheld from:		
	a	Form(s) W-2	25a	32,616
	b	Form(s) 1099	25b	17,761
	c	Other forms (see instructions)	25c	105
	d	Add lines 25a through 25c	25d	50,482
	26	2024 estimated tax payments and amount applied from 2023 return	26	0
	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	0	
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32	0	
33	Add lines 25d, 26, and 32. These are your total payments	33	50,482	

<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: XXXXXXXXX	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
	d	Account number: XXXXXXXXXXXXXXXXXXXX		
36	Amount of line 34 you want applied to your 2025 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	5,316
	38	Estimated tax penalty (see instructions)	38	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 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]

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 2  
(Form 1040)

Additional Taxes

OMB No. 1545-0074

2024

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.

Attachment  
Sequence No. 02

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

Randall S Richardson

Your social security number

Part 1 Tax

1	Additions to tax:		
a	Excess advance premium tax credit repayment. Attach Form 8962	1a.	
b	Repayment of new clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part II. Attach Form 8936 and Schedule A (Form 8936)	1b.	0
c	Repayment of previously owned clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part IV. Attach Form 8936 and Schedule A (Form 8936)	1c.	0
d	Recapture of net EPE from Form 4255, line 2a, column (i)	1d.	
e	Excessive payments (EP) from Form 4255. Check applicable box and enter amount. (i) <input type="checkbox"/> Line 1a, column (n)    (ii) <input type="checkbox"/> Line 1c, column (n) (iii) <input type="checkbox"/> Line 1d, column (n)    (iv) <input type="checkbox"/> Line 2a, column (n)	1e.	
f	20% EP from Form 4255. Check applicable box and enter amount. See instructions. (i) <input type="checkbox"/> Line 1a, column (o)    (ii) <input type="checkbox"/> Line 1c, column (o) (iii) <input type="checkbox"/> Line 1d, column (o)    (iv) <input type="checkbox"/> Line 2a, column (o)	1f.	
y	Other additions to tax (see instructions):	1y.	0
z	Add lines 1a through 1y	1z.	0
2	Alternative minimum tax. Attach Form 6251	2.	0
3	Add lines 1z and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17	3.	0

Part 2 Other Taxes

4	Self-employment tax. Attach Schedule SE	4.	0
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5.	0
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.	0
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here <input type="checkbox"/>	8.	0
9	Household employment taxes. Attach Schedule H	9.	0
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10.	0
11	Additional Medicare Tax. Attach Form 8959	11.	0
12	Net investment income tax. Attach Form 8960	12.	.862
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13.	0
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)

**Part III** Other Taxes (continued)

<b>17 Other additional taxes:</b>			
a	Recapture of other credits. List type, form number, and amount:	17a	0
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	17b	
c	Additional tax on HSA distributions. Attach Form 8889.	17c	0
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889.	17d	0
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e	0
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f	0
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g	
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h	
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i	
j	Section 72(m)(5) excess benefits tax.	17j	
k	Golden parachute payments	17k	0
l	Tax on accumulation distribution of trusts	17l	
m	Excise tax on insider stock compensation from an expatriated corporation	17m	
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n	
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o	
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p	
q	Any interest from Form 8621, line 24	17q	
z	Any other taxes. List type and amount:	17z	0
<b>18</b>	<b>Total additional taxes. Add lines 17a through 17z</b>	<b>18</b>	<b>0</b>
<b>19</b>	<b>Recapture of net EPE from Form 4255, line 1d, column (I)</b>	<b>19</b>	
<b>20</b>	<b>Section 965 net tax liability installment from Form 965-A</b>	<b>20</b>	
<b>21</b>	<b>Add lines 4, 7 through 16, 18, and 19. These are your total other taxes. Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b</b>	<b>21</b>	<b>862</b>

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.

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

Randall S Richardson

Your social security number

[REDACTED]

**Part II** Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required . . . . .		.1	281
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: 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 820 . . . . .			281

**Part III** 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	Section 1341 credit for repayment of amounts included in income from earlier years . . . . .	13b		
c	Net elective payment election amount from Form 3800, Part III, line 6, column (j) . . . . .	13c		
d	Deferred amount of net 965 tax liability (see instructions) . . . . .	13d		
z	Other refundable credits (see instructions): _____	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 3115 . . . . .		15	0



# Capital Gains and Losses

**2024**

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.

Attachment  
Sequence No. 12

Name(s) shown on return

Randall S Richardson

Your social security number

[REDACTED]

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 III** 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)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b	17,778	16,765		1,013
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	0	0	0	0
2 Totals for all transactions reported on Form(s) 8949 with Box B checked	0	0	0	0
3 Totals for all transactions reported on Form(s) 8949 with Box C checked	0	0	0	0
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824			4	0
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions.			6	0
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2			7	1,013

**Part III** 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)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b	79,697	61,850		11,847
8b Totals for all transactions reported on Form(s) 8949 with Box D checked	988	999	5	-6
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	253	251	0	2
10 Totals for all transactions reported on Form(s) 8949 with Box F checked	0	0	0	0
11 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
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			12	
13 Capital gain distributions. See the instructions			13	0
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions			14	0
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2			15	11,843

Part III Summary

16 Combine lines 7 and 15 and enter the result. . . . .	16	12,856
<ul style="list-style-type: none"> <li>• 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.</li> <li>• If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.</li> <li>• 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.</li> </ul>		
17 Are lines 15 and 16 both gains? <input checked="" type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> 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	0
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	0
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? <input checked="" type="checkbox"/> 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.  <input type="checkbox"/> 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:  <ul style="list-style-type: none"> <li>• The loss on line 16; or</li> <li>• (\$3,000), or if married filing separately, (\$1,500) . . . . .</li> </ul>	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?  <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040, line 16.  <input type="checkbox"/> 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. Security number or taxpayer identification number  
 Randall S Richardson

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

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

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

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for 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 (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		
	2.0 UNH	06/05/23	06/07/24	988	999	W	5	-6	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
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								0	
								0	
								0	
								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) . . .				988	999		5	-6

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 adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on prior return. Security number or taxpayer identification number  
 Randall S Richardson

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

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

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

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for 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 (g) 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		
	5 ISHARES Ultra STB ETF	03/19/23	05/23/24	253	251		0	2	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								0	
								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)				253	251		0	2

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 adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.



**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](http://www.irs.gov/Form8959) for instructions and the latest information.

**2024**

Attachment Sequence No. 71

Department of the Treasury  
Internal Revenue Service

Name(s) shown on return <b>Randall S Richardson</b>	Your social security number <b>[REDACTED]</b>
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**Part I Additional Medicare Tax on Medicare Wages**

1 Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5 . . . . .	.1	211,656		
2 Unreported tips from Form 4137, line 6. . . . .	.2	0		
3 Wages from Form 8919, line 6 . . . . .	.3			
4 Add lines 1 through 3 . . . . .	4	211,656		
5 Enter the following amount for your filing status:				
Married filing jointly . . . . . \$250,000				
Married filing separately . . . . . \$125,000				
Single, Head of household, or Qualifying surviving spouse \$200,000				
	5	250,000		
6 Subtract line 5 from line 4. If zero or less, enter -0- . . . . .	.6			0
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II . . . . .	.7			0

**Part II Additional Medicare Tax on Self-Employment Income**

8 Self-employment income from Schedule SE (Form 1040), Part I, line 6. If you had a loss, enter -0- . . . . .	.8	0		
9 Enter the following amount for your filing status:				
Married filing jointly . . . . . \$250,000				
Married filing separately . . . . . \$125,000				
Single, Head of household, or Qualifying surviving spouse \$200,000				
	9	250,000		
10 Enter the amount from line 4 . . . . .	10	211,656		
11 Subtract line 10 from line 9. If zero or less, enter -0- . . . . .	11	38,344		
12 Subtract line 11 from line 8. If zero or less, enter -0- . . . . .	.12			0
13 Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III . . . . .	.13			0

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

14 Railroad retirement (RTTA) compensation and tips from Form(s) W-2, box 14 (see instructions). . . . .	.14	0		
15 Enter the following amount for your filing status:				
Married filing jointly . . . . . \$250,000				
Married filing separately . . . . . \$125,000				
Single, Head of household, or Qualifying surviving spouse \$200,000				
	15	250,000		
16 Subtract line 15 from line 14. If zero or less, enter -0- . . . . .	.16			0
17 Additional Medicare Tax on railroad retirement (RTTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV . . . . .	.17			0

**Part IV Total Additional Medicare Tax**

18 Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-SS filers, see instructions), and go to Part V. . . . .	.18			0
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**Part V Withholding Reconciliation**

19 Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6 . . . . .	.19	3,174		
20 Enter the amount from line 1 . . . . .	.20	211,656		
21 Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages . . . . .	.21	3,069		
22 Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages . . . . .	.22			105
23 Additional Medicare Tax withholding on railroad retirement (RTTA) compensation from Form W-2, box 14 (see instructions) . . . . .	.23			0
24 Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-SS filers, see instructions) . . . . .	.24			105

Department of the Treasury  
Internal Revenue Service

Attach to your tax return.

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

Attachment  
Sequence No. 72

Name(s) shown on your tax return

Your social security number or EIN

Randall S Richardson

<b>Part I</b>	Investment Income	<input type="checkbox"/> Section 6013(g) election (see instructions)
		<input type="checkbox"/> Section 6013(h) election (see instructions)
		<input type="checkbox"/> Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions)		.1	2,501
2	Ordinary dividends (see instructions)		.2	7,322
3	Annuities (see instructions)		.3	0
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions)	4a		0
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b		0
c	Combine lines 4a and 4b		4c	0
5a	Net gain or loss from disposition of property (see instructions)	5a		12,856
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		5d	12,856
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)		6	
7	Other modifications to investment income (see instructions)		7	0
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7		.8	22,679

<b>Part II</b>	Investment Expenses Allocable to Investment Income and Modifications			
9a	Investment interest expenses (see instructions)	9a		
b	State, local, and foreign income tax (see instructions)	9b		0
c	Miscellaneous investment expenses (see instructions)	9c		
d	Add lines 9a, 9b, and 9c		9d	0
10	Additional modifications (see instructions)		10	0
11	Total deductions and modifications. Add lines 9d and 10		11	0

<b>Part III</b>	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	22,679
13	Modified adjusted gross income (see instructions)	13		324,396
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		74,396
16	Enter the smaller of line 12 or line 15.		16	22,679
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	862
18a	Net investment income (line 12 above)	18a		
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-	18c		
19a	Adjusted gross income (see instructions)	19a		
b	Highest tax bracket for estates and trusts for this year (see instructions)	19b		
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c		
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	