

Form 1040 Department of the Treasury—Internal Revenue Service U.S. Individual Income Tax Return

2022

OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status [X] Single [ ] Married filing jointly [ ] Married filing separately (MFS) [ ] Head of household (HOH) [ ] 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 is a child but not your dependent:

Your first name and middle initial: Thomas J. Last name: Woodard Your social security number: [REDACTED]

Home address (number and street): 5256 S Mission Rd, Ste 703 Apt. no. [REDACTED] Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund.

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in 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: [X] Were born before January 2, 1958 [ ] Are blind Spouse: [ ] Was born before January 2, 1958 [ ] 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): Child tax credit, Credit for other dependents

Income section table with rows 1a through 15. Includes sub-rows for interest, dividends, IRA, pensions, and adjustments. Total income: 41,553. Taxable income: 17,504.

Form 1040 (2022) **Thomas J. Woodard**

**[REDACTED]** 2

**Tax and Credits**

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972	16	4,201
3	<input type="checkbox"/>	17	
17	Amount from Schedule 2, line 3	18	4,201
18	Add lines 16 and 17	19	
19	Child tax credit or credit for other dependents from Schedule 8812	20	
20	Amount from Schedule 3, line 8	21	
21	Add lines 19 and 20	22	4,201
22	Subtract line 21 from line 18. If zero or less, enter -0-	23	18,698
23	Other taxes, including self-employment tax, from Schedule 2, line 21	24	22,899
24	Add lines 22 and 23. This is your total tax		

**Payments**

25	Federal income tax withheld from:		
a	Form(s) W-2	25a	
b	Form(s) 1099	25b	
c	Other forms (see instructions)	25c	
d	Add lines 25a through 25c	25d	
26	2022 estimated tax payments and amount applied from 2021 return	26	
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	

**Refund**

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	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number		
36	Amount of line 34 you want applied to your 2023 estimated tax	36	

**Amount You Owe**

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	23,257
38	Estimated tax penalty (see instructions)	38	358

**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 **Jay C. Niederhauser** Phone no. **435-655-3300** Personal identification number (PIN) **01795**

**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 *[Signature]* Date \_\_\_\_\_ Your occupation **Sales**

Spouse's signature \_\_\_\_\_ Date \_\_\_\_\_ Spouse's occupation \_\_\_\_\_

Phone no. \_\_\_\_\_ Email address \_\_\_\_\_

Preparer's name **Jay C. Niederhauser** Preparer's signature *[Signature]* Date **9/29/23** PTIN **P00419876** Check if:  Self-employed

Firm's name **Niederhauser & Davis, LLC** Phone no. **435-655-3300**

Firm's address **Park City UT 84068-0460** Firm's EIN **87-0624335**

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

Form 1040 (2022)

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

Department of the Treasury  
Internal Revenue Service

**Additional Income and Adjustments to Income**

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

**2022**

Attachment  
Sequence No. **01**

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

**Thomas J. Woodard**

Your social security number  
[REDACTED]

**Part I Additional Income**

1	Taxable refunds, credits, or offsets of state and local income taxes		1	
2a	Alimony received		2a	
b	Date of original divorce or separation agreement (see instructions):			
3	Business income or (loss). Attach Schedule C		3	132,332
4	Other gains or (losses). Attach Form 4797		4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		5	
6	Farm income or (loss). Attach Schedule F		6	
7	Unemployment compensation		7	
8	Other income:			
a	Net operating loss	8a ( )		
b	Gambling	8b		
c	Cancellation of debt	8c		
d	Foreign earned income exclusion from Form 2555	8d ( 104,087 )		
e	Income from Form 8853	8e		
f	Income from Form 8889	8f		
g	Alaska Permanent Fund dividends	8g		
h	Jury duty pay	8h		
i	Prizes and awards	8i		
j	Activity not engaged in for profit income	8j		
k	Stock options	8k		
l	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	8l		
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m		
n	Section 951(a) inclusion (see instructions)	8n		
o	Section 951A(a) inclusion (see instructions)	8o		
p	Section 461(l) excess business loss adjustment	8p		
q	Taxable distributions from an ABLA account (see instructions)	8q		
r	Scholarship and fellowship grants not reported on Form W-2	8r		
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s ( )		
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t		
u	Wages earned while incarcerated	8u		
z	Other income. List type and amount:	8z		
9	Total other income. Add lines 8a through 8z		9	-104,087
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8		10	28,245

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

Schedule 1 (Form 1040) 2022

**Thomas J. Woodard**

Schedule 1 (Form 1040) 2022

**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	9,349
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 or 1040-SR, line 10, or Form 1040-NR, line 10a		26	9,349

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

**Additional Taxes**

OMB No. 1545-0074

**2022**

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

**Thomas J. Woodard**

Your social security number

059-00-0763

**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	18,698
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	
12	Net investment income tax. Attach Form 8960	12	
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) 2022

**Thomas J. Woodard**

Schedule 2 (Form 1040) 2022

**[REDACTED]**

**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>	<b>18,698</b>



Form **1040**

**Tax Return Reconciliation Worksheet, Page 2**

**2022**

Name **Thomas J. Woodard**

Tp TIN **[REDACTED]**

38 Amount from line 37 (adjusted gross income) **38 32,204**

39a Check  You were born before January 2, 1958,  Blind. } Total boxes checked **39a 1**  
 if:  Spouse was born before January 2, 1958,  Blind. }

**Standard Deduction for—**

- People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions.
- All others:
  - Single or Married filing separately, \$12,950
  - Married filing jointly or Qualifying widow(er), \$25,900
  - Head of household, \$19,400

b If your spouse itemizes on a separate return or you were a dual-status alien, check here **39b**

40 Itemized deductions (from Schedule A) or your standard deduction (see left margin) **40 14,700**

a

41 Subtract line 40 and 40b from line 38 **41 17,504**

42 Qualified business income deduction (see instructions) **42**

43 Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0- **43 17,504**

44 Tax (see instr.). Check if any from: a  Form(s) 8814 b  Form 4972 c  **44 4,201**

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 4,201**

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

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**

56 Subtract line 55 from line 47. If line 55 is more than line 47, enter -0- **56 4,201**

**Other Taxes** (Schedule 2)

57 Self-employment tax. Attach Schedule SE **57 18,698**

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) **61**

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

63 Add lines 56 through 61. This is your total tax **63 22,899**

**Payments** (Schedule 3)

64 Federal income tax withheld from:

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

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

c Other forms **64c**

65 2022 estimated tax payments and amount applied from 2021 return **65**

66 Earned income credit (EIC) **66**

67 Additional child tax credit. Attach Schedule 8812 **67**

68 American opportunity credit from Form 8863, line 8 **68**

69 Recovery rebate credit **69**

70 Net premium tax credit. Attach Form 8962 **70**

71 Amount paid with request for extension to file **71**

72 Excess social security and tier 1 RRTA tax withheld **72**

73 Credit for federal tax on fuels. Attach Form 4136 **73**

74 Other payments and refundable credits **74**

75 Total pymts. Add lines 64 - 74. **75**

**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 2023 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 23,257**

80 Estimated tax penalty (see instructions) **80 358**

**Int/Pen**

Date filed Int Fail to file Fail to pay Total

Third Party Designee Do you want to allow another person to discuss this return with the IRS (see instructions)?  Yes. Complete below.  No Personal identification no. (PIN) **01795**

Designee's Name **Jay C. Niederhauser** Phone no. **435-655-3300**

**Other Info**

Taxpayer Daytime phone number Taxpayer: Occupation **Sales** IRS Identity Protection PIN

Spouse: Occupation IRS Identity Protection PIN

Taxpayer  Spouse Email address

Form **2210**

Department of the Treasury  
Internal Revenue Service

**Underpayment of Estimated Tax by  
Individuals, Estates, and Trusts**  
Go to [www.irs.gov/Form2210](http://www.irs.gov/Form2210) for instructions and the latest information.  
Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

OMB No. 1545-0140

**2022**  
Attachment  
Sequence No. **06**

Name(s) shown on tax return

Identifying number

**Thomas J. Woodard**

**Do You Have To File Form 2210?**

Complete lines 1 through 7 below. Is line 4 or line 7 less than \$1,000? Yes → **Don't file Form 2210. You don't owe a penalty.**

No ↓

Complete lines 8 and 9 below. Is line 6 equal to or more than line 9? Yes → **You don't owe a penalty. Don't file Form 2210 unless box E in Part II applies, then file page 1 of Form 2210.**

No ↓

You may owe a penalty. Does any box in Part II below apply? Yes → **You must file Form 2210. Does box B, C, or D in Part II apply?**

No ↓

**Don't file Form 2210.** You aren't required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III as a worksheet and enter your penalty amount on your tax return, but **don't file Form 2210.**

No ↓ **You aren't required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III as a worksheet and enter your penalty amount on your tax return, but file only page 1 of Form 2210.**

Yes → **You must figure your penalty.**

**Part I Required Annual Payment**

1 Enter your 2022 tax after credits from Form 1040, 1040-SR, or 1040-NR, line 22. (See the instructions if not filing Form 1040.)	1	4,201
2 Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	18,698
3 Other payments and refundable credits (see instructions)	3	
4 Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop; you don't owe a penalty. <b>Don't file Form 2210</b>	4	22,899
5 Multiply line 4 by 90% (0.90)	5	20,609
6 Withholding taxes. <b>Don't</b> include estimated tax payments. See instructions	6	
7 Subtract line 6 from line 4. If less than \$1,000, stop; you don't owe a penalty. <b>Don't file Form 2210</b>	7	22,899
8 Maximum required annual payment based on prior year's tax (see instructions)	8	8,873
9 <b>Required annual payment.</b> Enter the smaller of line 5 or line 8	9	8,873

Next: Is line 9 more than line 6?

- No. You **don't** owe a penalty. **Don't file Form 2210** unless box E below applies.
- Yes. You may owe a penalty, but **don't file Form 2210** unless one or more boxes in Part II below applies.
- If box B, C, or D applies, you must figure your penalty and file Form 2210.
  - If box A or E applies (but not B, C, or D), file only page 1 of Form 2210. You **aren't** required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III as a worksheet and enter your penalty on your tax return, but **file only page 1 of Form 2210.**

**Part II Reasons for Filing. Check applicable boxes. If none apply, don't file Form 2210.**

- A  You request a **waiver** (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you aren't required to figure your penalty.
- B  You request a **waiver** (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C  Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D  Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E  You filed or are filing a joint return for either 2021 or 2022, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you **aren't** required to figure your penalty (unless box B, C, or D applies).

For Paperwork Reduction Act Notice, see separate instructions.

Form **2210** (2022)

**Thomas J. Woodard**



Form 2210 (2022)

**Part III Penalty Computation** (See the instructions if you're filing Form 1040-NR.)

Section A—Figure Your Underpayment		Payment Due Dates			
		(a) 4/15/22	(b) 6/15/22	(c) 9/15/22	(d) 1/15/23
<b>10</b> Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 27. Otherwise, enter 25% (0.25) of line 9, Form 2210, in each column. For fiscal year filers, see instructions	10	2,218	2,218	2,218	2,219
<b>11</b> Estimated tax paid and tax withheld (see the instructions). For column (a) only, also enter the amount from line 11 on line 15, column (a). If line 11 is equal to or more than line 10 for all payment periods, stop here; you don't owe a penalty. Don't file Form 2210 unless you checked a box in Part II	11				

Complete lines 12 through 18 of one column before going to line 12 of the next column.

<b>12</b> Enter the amount, if any, from line 18 in the previous column	12				
<b>13</b> Add lines 11 and 12	13				
<b>14</b> Add the amounts on lines 16 and 17 in the previous column	14		2,218	4,436	6,654
<b>15</b> Subtract line 14 from line 13. If zero or less, enter -0-. For column (a) only, enter the amount from line 11	15	0	0	0	0
<b>16</b> If line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-	16		2,218	4,436	
<b>17</b> Underpayment. If line 10 is equal to or more than line 15, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18	17	2,218	2,218	2,218	2,219
<b>18</b> Overpayment. If line 15 is more than line 10, subtract line 10 from line 15. Then go to line 12 of the next column	18				

**Section B—Figure the Penalty** (Use the Worksheet for Form 2210, Part III, Section B — Figure the Penalty in the instructions.)  
See 2210 Worksheet

<b>19</b> Penalty. Enter the total penalty from line 14 of the Worksheet for Form 2210, Part III, Section B — Figure the Penalty. Also include this amount on Form 1040, 1040-SR, or 1040-NR, line 38; or Form 1041, line 27. Don't file Form 2210 unless you checked a box in Part II	19	358
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**Form 2210**

**Underpayment of Estimated Tax Worksheet**

**2022**

Name(s) shown on return

**Thomas J. Woodard**

Social security number

██████████-██████████-██████████

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Due date of estimated payment	<u>04/15/22</u>	<u>06/15/22</u>	<u>09/15/22</u>	<u>01/15/23</u>
Amount of underpayment	<u>2,218</u>	<u>2,218</u>	<u>2,218</u>	<u>2,219</u>

Prior year overpayment applied	_____	_____	_____	_____
Withholding	_____	_____	_____	_____
Excess FICA	_____	_____	_____	_____
Other payments	_____	_____	_____	_____

	1st Payment	2nd Payment	3rd Payment	4th Payment	5th Payment
Date of payment	_____	_____	_____	_____	_____
Amount of payment	_____	_____	_____	_____	_____

Qtr	From	To	Underpayment	#Days	Rate %	Penalty
1	4/15/22	6/30/22	2,218	76	4.00	18
1	6/30/22	9/30/22	2,218	92	5.00	28
1	9/30/22	12/31/22	2,218	92	6.00	34
1	12/31/22	4/15/23	2,218	105	7.00	45
2	6/15/22	6/30/22	2,218	15	4.00	4
2	6/30/22	9/30/22	2,218	92	5.00	28
2	9/30/22	12/31/22	2,218	92	6.00	34
2	12/31/22	4/15/23	2,218	105	7.00	45
3	9/15/22	9/30/22	2,218	15	5.00	5
3	9/30/22	12/31/22	2,218	92	6.00	34
3	12/31/22	4/15/23	2,218	105	7.00	45
4	1/15/23	4/15/23	2,219	90	7.00	38
<b>Total Penalty</b>						<b>358</b>

**SCHEDULE A  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service

**Itemized Deductions**

Go to [www.irs.gov/ScheduleA](http://www.irs.gov/ScheduleA) for instructions and the latest information.  
Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

**2022**

Attachment  
Sequence No. **07**

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

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

Your social security number

**Thomas J. Woodard**

<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	<b>32,204</b>	
	3	Multiply line 2 by 7.5% (0.075)	3	<b>2,415</b>	
	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 checked="" type="checkbox"/>		5a	<b>647</b>	
	b State and local real estate taxes (see instructions)		5b		
	c State and local personal property taxes		5c		
	d Add lines 5a through 5c		5d	<b>647</b>	
	e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)		5e	<b>647</b>	
	6 Other taxes. List type and amount:		6		
	7	Add lines 5e and 6	7	<b>647</b>	
<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		
	10 Add lines 8e and 9		10		
	<b>Gifts to Charity</b>	11 Gifts by cash or check. If you made any gift of \$250 or more, see instructions		11	
		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	
13 Carryover from prior year		13			
14 Add lines 11 through 13		14			
<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	<b>647</b>	
	18 If you elect to itemize deductions even though they are less than your standard deduction, check this box <input type="checkbox"/>				

SCHEDULE C (Form 1040)

Profit or Loss From Business (Sole Proprietorship)

OMB No. 1545-0074

2022

Attachment Sequence No. 09

Department of the Treasury Internal Revenue Service

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

Name of proprietor: Thomas J. Woodard. Social security number (SSN): [REDACTED]. Principal business: Consulting. Business name: Baja Seri, LLC. Business address: Calle Salvatierra #23 Oriente, Loreto, B.C.S. Accounting method: Cash. Did you materially participate? Yes. If you started or acquired this business during 2022, check here. Did you make any payments in 2022 that would require you to file Form(s) 1099? No. If "Yes," did you or will you file required Form(s) 1099? No.

Part I Income

Table with 7 rows for income calculation. Line 1: Gross receipts or sales, 132,332. Line 2: Returns and allowances. Line 3: Subtract line 2 from line 1, 132,332. Line 4: Cost of goods sold. Line 5: Gross profit, 132,332. Line 6: Other income. Line 7: Gross income, 132,332.

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

Table with 28 rows for expense calculation. Rows 8-17 list various expenses like Advertising, Car and truck expenses, Commissions and fees, etc. Rows 18-27 list home expenses like Office expense, Pension and profit-sharing plans, Rent or lease, etc. Row 28: Total expenses before expenses for business use of home, 0. Row 29: Tentative profit or (loss), 132,332.

Row 28: Total expenses before expenses for business use of home. Add lines 8 through 27. Amount: 0. Row 29: Tentative profit or (loss). Subtract line 28 from line 7. Amount: 132,332.

30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions.

Simplified method filers only: 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.

31 Net profit or (loss). Subtract line 30 from line 29. Amount: 132,332. Includes instructions for profit and loss reporting.

32 If you have a loss, check the box that describes your investment in this activity. See instructions. Includes instructions for investment at risk reporting.

**SCHEDULE SE  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service

**Self-Employment Tax**

Go to [www.irs.gov/ScheduleSE](http://www.irs.gov/ScheduleSE) for instructions and the latest information.  
Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

**2022**

Attachment  
Sequence No. **17**

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

Social security number of person  
with self-employment income

**Thomas J. Woodard**

**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 AH

**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**

**132,332**

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

**3**

**132,332**

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

**4a**

**122,209**

**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**

**122,209**

**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**

**122,209**

**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 2022

**7**

**147,000**

**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 \$147,000 or more, skip lines 8b through 10, and go to line 11

**8a**

**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**

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

**9**

**147,000**

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

**10**

**15,154**

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

**11**

**3,544**

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

**12**

**18,698**

**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**

**9,349**

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

**Farm Optional Method.** You may use this method only if (a) your gross farm income<sup>1</sup> wasn't more than \$9,060, or (b) your net farm profits<sup>2</sup> were less than \$6,540.

**14** Maximum income for optional methods

**14**

**6,040**

**15** Enter the smaller of: two-thirds (2/3) of gross farm income<sup>1</sup> (not less than zero) or \$6,040. Also include this amount on line 4b above

**15**

**Nonfarm Optional Method.** You may use this method only if (a) your net nonfarm profits<sup>3</sup> were less than \$6,540 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. **Caution:** You may use this method no more than five times.

**16** Subtract line 15 from line 14

**16**

**17** Enter the smaller of: two-thirds (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

**17**

<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 **6251**

**Alternative Minimum Tax—Individuals**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

Go to [www.irs.gov/Form6251](http://www.irs.gov/Form6251) for instructions and the latest information.  
Attach to Form 1040, 1040-SR, or 1040-NR.

**2022**

Attachment  
Sequence No. **32**

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

Your social security number

**Thomas J. Woodard**

**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>	<b>17,504</b>
<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>	<b>14,700</b>
<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>	
<b>n</b>	Loss limitations (difference between AMT and regular tax income or loss)	<b>2n</b>	<b>0</b>
<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 \$776,100, see instructions.)	<b>4</b>	<b>32,204</b>

**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>\$ 539,900</td> <td>\$ 75,900</td> <td rowspan="3">}</td> </tr> <tr> <td>Married filing jointly or qualifying widow(er)</td> <td>1,079,800</td> <td>118,100</td> </tr> <tr> <td>Married filing separately</td> <td>539,900</td> <td>59,050</td> </tr> </table> <p>If line 4 is <b>over</b> the amount shown above for your filing status, see instructions.</p>	<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	\$ 539,900	\$ 75,900	}	Married filing jointly or qualifying widow(er)	1,079,800	118,100	Married filing separately	539,900	59,050	<b>5</b>	<b>75,900</b>
<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	\$ 539,900	\$ 75,900	}														
Married filing jointly or qualifying widow(er)	1,079,800	118,100															
Married filing separately	539,900	59,050															
<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>	<b>0</b>														
<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 \$206,100 or less (\$103,050 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result.</li> </ul>	<b>7</b>															
<b>8</b>	Alternative minimum tax foreign tax credit (see instructions)	<b>8</b>															
<b>9</b>	Tentative minimum tax. Subtract line 8 from line 7	<b>9</b>	<b>0</b>														
<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>	<b>4,201</b>														
<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>	<b>0</b>														

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

Form **6251** (2022)

Form **2555**

Foreign Earned Income

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

Attach to Form 1040 or 1040-SR.

**2022**

Attachment  
Sequence No. **34**

Go to [www.irs.gov/Form2555](http://www.irs.gov/Form2555) for instructions and the latest information.

For Use by U.S. Citizens and Resident Aliens Only

Name shown on Form 1040 or 1040-SR

**Thomas J. Woodard**

Your social security number

[REDACTED]

**Part I General Information**

1 Your foreign address (including country)

**See Statement 1**

2 Your occupation

**Sales**

3 Employer's name **WBA San Basilio, SdeRLdeCV**

4a Employer's U.S. address

b Employer's foreign address **See Statement 2**

5 Employer is (check one):  
a  A foreign entity  
b  A U.S. company  
c  Self  
d  A foreign affiliate of a U.S. company  
e  Other (specify)

6a If you previously filed Form 2555 or Form 2555-EZ, enter the last year you filed the form. **2021**

b If you didn't previously file Form 2555 or Form 2555-EZ to claim either of the exclusions, check here  and go to line 7.

c Have you ever revoked either of the exclusions?  Yes  No

d If you answered "Yes," enter the type of exclusion and the tax year for which the revocation was effective.

7 Of what country are you a citizen/national? **United States**

8a Did you maintain a separate foreign residence for your family because of adverse living conditions at your tax home? See **Second foreign household** in the instructions  Yes  No

b If "Yes," enter city and country of the separate foreign residence. Also, enter the number of days during your tax year that you maintained a second household at that address.

9 List your tax home(s) during your tax year and date(s) established. **Baja California Sur, Mexico 01/15/07**

**Next, complete either Part II or Part III. If an item doesn't apply, enter "N/A." If you don't give the information asked for, any exclusion or deduction you claim may be disallowed.**

**Part II Taxpayers Qualifying Under Bona Fide Residence Test**

**Note:** Only U.S. citizens and resident aliens who are citizens or nationals of U.S. treaty countries can use this test. See instructions.

10 Date bona fide residence began **01/15/07**, and ended **Continue**

11 Kind of living quarters in foreign country  
a  Purchased house  
b  Rented house or apartment  
c  Rented room  
d  Quarters furnished by employer

12a Did any of your family live with you abroad during any part of the tax year?  Yes  No

b If "Yes," who and for what period? **None**

13a Have you submitted a statement to the authorities of the foreign country where you claim bona fide residence that you aren't a resident of that country? See instructions  Yes  No

b Are you required to pay income tax to the country where you claim bona fide residence? See instructions  Yes  No

**If you answered "Yes" to 13a and "No" to 13b, you don't qualify as a bona fide resident. Don't complete the rest of this part.**

14 If you were present in the United States or its possessions during the tax year, complete columns (a)-(d) below. Don't include the income from column (d) in Part IV, but report it on Form 1040 or 1040-SR.

(a) Date arrived in U.S.	(b) Date left U.S.	(c) Number of days in U.S. on business	(d) Income earned in U.S. on business (attach computation)	(a) Date arrived in U.S.	(b) Date left U.S.	(c) Number of days in U.S. on business	(d) Income earned in U.S. on business (attach computation)

15a List any contractual terms or other conditions relating to the length of your employment abroad.

**NA**

b Enter the type of visa under which you entered the foreign country. **Resident Visa**

c Did your visa limit the length of your stay or employment in a foreign country? If "Yes," attach explanation  Yes  No

d Did you maintain a home in the United States while living abroad?  Yes  No

e If "Yes," enter address of your home, whether it was rented, the names of the occupants, and their relationship to you. **NA**

**Part III Taxpayers Qualifying Under Physical Presence Test**

**Note:** U.S. citizens and all resident aliens can use this test. See instructions.

- 16 The physical presence test is based on the 12-month period from ..... through .....
- 17 Enter your principal country of employment during your tax year. ....
- 18 If you traveled abroad during the 12-month period entered on line 16, complete columns (a)-(f) below. Exclude travel between foreign countries that didn't involve travel on or over international waters, or in or over the United States, for 24 hours or more. If you have no travel to report during the period, enter "Physically present in a foreign country or countries for the entire 12-month period." **Don't** include the income from column (f) below in Part IV, but report it on Form 1040 or 1040-SR.

(a) Name of country (including U.S.)	(b) Date arrived	(c) Date left	(d) Full days present in country	(e) No. of days in U.S. on busn.	(f) Income earned in U.S. on business (attach computation)

**Part IV All Taxpayers**

**Note:** Enter on lines 19 through 23 all income, including noncash income, you earned and actually or constructively received during your 2022 tax year for services you performed in a foreign country. If any of the foreign earned income received this tax year was earned in a prior tax year, or will be earned in a later tax year (such as a bonus), see the instructions. **Don't** include income from line 14, column (d), or line 18, column (f). Report amounts in U.S. dollars, using the exchange rates in effect when you actually or constructively received the income.

If you are a cash basis taxpayer, report on Form 1040 or 1040-SR all income you received in 2022, no matter when you performed the service.

2022 Foreign Earned Income		Amount (in U.S. dollars)
19	Total wages, salaries, bonuses, commissions, etc. ....	19
20	Allowable share of income for personal services performed (see instructions):	
a	In a business (including farming) or profession .....	20a 132,332
b	In a partnership. List partnership's name and address and type of income. ....	20b
21	Noncash income (market value of property or facilities furnished by employer—attach statement showing how it was determined):	
a	Home (lodging) .....	21a
b	Meals .....	21b
c	Car .....	21c
d	Other property or facilities. List type and amount. ....	21d
22	Allowances, reimbursements, or expenses paid on your behalf for services you performed:	
a	Cost of living and overseas differential .....	22a
b	Family .....	22b
c	Education .....	22c
d	Home leave .....	22d
e	Quarters .....	22e
f	For any other purpose. List type and amount. ....	22f
g	Add lines 22a through 22f .....	22g
23	Other foreign earned income. List type and amount. ....	23
24	Add lines 19 through 21d, line 22g, and line 23 .....	24 132,332
25	Total amount of meals and lodging included on line 24 that is excludable (see instructions) .....	25
26	Subtract line 25 from line 24. Enter the result here and on line 27 on page 3. This is your 2022 foreign earned income .....	26 132,332

**Part V All Taxpayers**

27	Enter the amount from line 26	27	132,332
Are you claiming the housing exclusion or housing deduction?			
<input type="checkbox"/> Yes. Complete Part VI.			
<input checked="" type="checkbox"/> No. Go to Part VII.			

**Part VI Taxpayers Claiming the Housing Exclusion and/or Deduction**

28	Qualified housing expenses for the tax year (see instructions)	28	
29a	Enter location where housing expenses incurred. See instructions.		
b	Enter limit on housing expenses. See instructions	29b	
30	Enter the smaller of line 28 or line 29b	30	
31	Number of days in your qualifying period that fall within your 2022 tax year (see instructions)	31	31 days
32	Multiply \$49.10 by the number of days on line 31. If 365 is entered on line 31, enter \$17,920 here	32	
33	Subtract line 32 from line 30. If the result is zero or less, don't complete the rest of this part or any of Part IX	33	
34	Enter employer-provided amounts. See instructions	34	
35	Divide line 34 by line 27. Enter the result as a decimal (rounded to at least three places), but don't enter more than "1.000"	35	
36	<b>Housing exclusion.</b> Multiply line 33 by line 35. Enter the result but don't enter more than the amount on line 34. Also, complete Part VIII	36	

**Note:** The housing deduction is figured in Part IX. If you choose to claim the foreign earned income exclusion, complete Parts VII and VIII before Part IX.

**Part VII Taxpayers Claiming the Foreign Earned Income Exclusion**

37	Maximum foreign earned income exclusion. Enter \$112,000	37	112,000
38	• If you completed Part VI, enter the number from line 31. • All others, enter the number of days in your qualifying period that fall within your 2022 tax year. See the instructions for line 31.	38	365 days
39	• If line 38 and the number of days in your 2022 tax year (usually 365) are the same, enter "1.000." • Otherwise, divide line 38 by the number of days in your 2022 tax year and enter the result as a decimal (rounded to at least three places).	39	1.000
40	Multiply line 37 by line 39	40	112,000
41	Subtract line 36 from line 27	41	132,332
42	<b>Foreign earned income exclusion.</b> Enter the smaller of line 40 or line 41. Also, complete Part VIII	42	112,000

**Part VIII Taxpayers Claiming the Housing Exclusion, Foreign Earned Income Exclusion, or Both**

43	Add lines 36 and 42	43	112,000
44	Deductions allowed in figuring your adjusted gross income (Form 1040 or 1040-SR, line 11) that are allocable to the excluded income. See instructions and attach computation <b>See Wrksheet</b>	44	7,913
45	Subtract line 44 from line 43. Enter the result here and on Schedule 1 (Form 1040), line 8d. Complete the Foreign Earned Income Tax Worksheet in the Instructions for Forms 1040 if you enter an amount on this line	45	104,087

**Part IX Taxpayers Claiming the Housing Deduction — Complete this part only if (a) line 33 is more than line 36, and (b) line 27 is more than line 43.**

46	Subtract line 36 from line 33	46	
47	Subtract line 43 from line 27	47	
48	Enter the smaller of line 46 or line 47	48	
<b>Note:</b> If line 47 is more than line 48 and you couldn't deduct all of your 2021 housing deduction because of the 2021 limit, use the Housing Deduction Carryover Worksheet in the instructions to figure the amount to enter on line 49. Otherwise, go to line 50.			
49	Housing deduction carryover from 2021 (from the Housing Deduction Carryover Worksheet in the instructions)	49	
50	<b>Housing deduction.</b> Add lines 48 and 49. Enter the total here and on Schedule 1 (Form 1040), line 24j. Complete the Foreign Earned Income Tax Worksheet in the Instructions for Forms 1040 if you enter an amount on this line	50	

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, 1040-PR, or 1040-SS.

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

OMB No. 1545-0074

**2022**

Attachment Sequence No. **71**

Department of the Treasury  
Internal Revenue Service

Name(s) shown on return

**Thomas J. Woodard**

Your social security number

██████████-██-████

#### 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		
2 Unreported tips from Form 4137, line 6	2		
3 Wages from Form 8919, line 6	3		
4 Add lines 1 through 3	4		
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	<b>200,000</b>	
6 Subtract line 5 from line 4. If zero or less, enter -0-	6		<b>0</b>
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II	7		

#### 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- (Form 1040-PR or 1040-SS filers, see instructions.)	8	<b>122,209</b>	
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	<b>200,000</b>	
10 Enter the amount from line 4	10		
11 Subtract line 10 from line 9. If zero or less, enter -0-	11	<b>200,000</b>	
12 Subtract line 11 from line 8. If zero or less, enter -0-	12		<b>0</b>
13 Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III	13		

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

14 Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14		
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	<b>200,000</b>	
16 Subtract line 15 from line 14. If zero or less, enter -0-	16		<b>0</b>
17 Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV	17		

#### 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-PR or 1040-SS filers, see instructions), and go to Part V	18		
--	----	--	--

#### 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		
20 Enter the amount from line 1	20		
21 Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21		
22 Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		<b>0</b>
23 Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		
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-PR or 1040-SS filers, see instructions)	24		

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

Form **8959** (2022)

# Federal Statements

## WBA San Basilio, SdeRLdeCV

### Statement 1 - Form 2555, Part I, Line 1 - Your Foreign Address

Foreign Street Address	Foreign City	Foreign State/Province	Foreign Country	Foreign Postal Code
Calle Salvatierra #23 Oriente	Loreto	B. C. S.	Mexico	23880

## WBA San Basilio, SdeRLdeCV

### Statement 2 - Form 2555, Part I, Line 4b - Employer's Foreign Address

Foreign Street Address	Foreign City	Foreign State/Province	Foreign Country	Foreign Postal Code
Calle Salvatierra #23 Oriente	Loreto	B. C. S.	Mexico	23880

Form <b>1040</b>	<b>Pension/Annuity Report</b>	<b>2022</b>
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Name **Thomas J. Woodard** Taxpayer Identification Number [REDACTED]

T/S	Payer	Box 7 Code	Gross Distribution	Rollover	Taxable Amount
A	Allergan Pension	7	13,308	-	13,308
B					
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					
M					
N					
O					
	Taxpayer		13,308	-	13,308
	Spouse				
	Total		13,308		13,308

T/S	NIIT	Capital Gain Distribution	Public Safety Officer Exclusion	Federal Withholding	State Withholding	Local Withholding
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
	Taxpayer					
	Spouse					
	Total					

Form <b>2555</b>	<b>Foreign Earned Income Allocation Worksheet</b>	<b>2022</b>
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Name <b>Thomas J. Woodard</b>	Taxpayer Identification Number <b>[REDACTED]</b>
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US days worked during foreign assignment .....	
Foreign days worked during foreign assignment .....	<u>240</u>
US days worked before(after) foreign assignment .....	
Foreign days worked before(after) foreign assignment .....	
Total days worked in the tax year .....	<u>240</u>

Description	Total	During Foreign Assignment		Before (After) Foreign Assignment	
		U.S.	Foreign	U.S.	Foreign
<b>Foreign Earned Income</b>					
Wages and salaries:					
Business Income:					
<b>See Statement</b>	<b>132,332</b>		<b>132,332</b>		
Partnership:					
Noncash income:					
Home (lodging)					
Meals					
Car					
Other					
Allowances, reimbursements:					
Living differential					
Family					
Education					
Home leave					
Quarters					
Other					
Other foreign earned income					
Excludable meals and lodging					
Total foreign earned income	<b>132,332</b>		<b>132,332</b>		
<b>Allocable Deductions</b>					
Business expenses:					
Self-Employment Deductions:					
Employer-equivalent SE Tax :					
<b>Stmt</b>	<b>9,349</b>		<b>9,349</b>		
Keogh/SEP/SIMPLE					
Other:					
Moving expenses					
Total Allocable Deductions	<b>9,349</b>		<b>9,349</b>		

**Form 2555, Line 49 - Housing Deduction Carryover Worksheet**

- |  |             |
|--|-------------|
| 1. Enter the amount from your 2021 Form 2555, line 46 .....  | 1. _____    |
| 2. Enter the amount from your 2021 Form 2555, line 48 .....  | 2. _____    |
| 3. Subtract line 2 from line 1. If the result is zero, stop here; enter -0- on line 49 of your 2022 Form 2555. You do not have any housing deduction carryover from 2021 .....                   | 3. <u>0</u> |
| 4. Enter the amount from your 2022 Form 2555, line 47 .....  | 4. _____    |
| 5. Enter the amount from your 2022 Form 2555, line 48 .....  | 5. _____    |
| 6. Subtract line 5 from line 4 .....   | 6. _____    |
| 7. Enter the <b>smaller</b> of line 3 or line 6 here and on line 49 of your 2022 Form 2555. If line 3 is <b>more than</b> line 6, you may not carry the difference over to any future year ..... | 7. _____    |

Form <b>2555</b>	<b>Deductions Allocable to Excluded Income</b>	<b>2022</b>
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Name <b>Thomas J. Woodard</b>	Taxpayer Identification Number <b>[REDACTED]</b>
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**Allocable Moving Expenses Connected with 2021 and 2022**

Moving expenses to be allocated \_\_\_\_\_

Allocation Ratio:

Numerator:

1. 2021 Foreign earned income and housing exclusion. (2021 Form 2555, page 3, line 43)	_____
2. 2022 Foreign earned income and housing exclusion. (2022 Form 2555, page 3, line 43)	_____
3. Add the amounts on line 1 and 2. This is the ratio numerator.	_____

Denominator:

4. 2021 Total foreign earned income. (2021 Form 2555, page 2, line 26)	_____
5. 2022 Total foreign earned income. (2022 Form 2555, page 2, line 26)	_____
6. Add the amounts on line 4 and 5. This is the ratio denominator.	_____

Divide line 3 by line 6. This is the allocation ratio. \_\_\_\_\_ x \_\_\_\_\_

Moving expenses connected to 2021 and 2022 allocable to excluded income. \_\_\_\_\_

**Allocable Moving Expenses Connected with 2022 and 2023**

Moving expenses to be allocated \_\_\_\_\_

Allocation Ratio:

Numerator:

1. 2022 Foreign earned income and housing exclusion. (2022 Form 2555, page 3, line 43)	_____
2. 2023 Foreign earned income and housing exclusion.	_____
3. Add the amounts on line 1 and 2. This is the ratio numerator.	_____

Denominator:

4. 2022 Total foreign earned income. (2022 Form 2555, page 2, line 26)	_____
5. 2023 Total foreign earned income.	_____
6. Add the amounts on line 4 and 5. This is the ratio denominator.	_____

Divide line 3 by line 6. This is the allocation ratio. \_\_\_\_\_ x \_\_\_\_\_

Moving expenses connected to 2022 and 2023 allocable to excluded income. \_\_\_\_\_

**Form 2555 Deductions Allocable to Excluded Income**

Deductions to be allocated to excluded income:

Business expenses	_____
Self-Employment deductions:	
Employer-equivalent SE tax	9,349
Keogh/SEP/SIMPLE	_____
Moving expenses connected entirely with current year	_____
Other expenses	_____
<b>Total Deductions to be allocated to excluded income</b>	<b>9,349</b>

Exclusion ratio:

1. Foreign earned income and housing exclusion. (2022 Form 2555, page 3, line 43)	112,000
2. Total foreign earned income. (2022 Form 2555, page 2, line 26)	132,332

Divide line 1 by line 2. This is the exclusion ratio. \_\_\_\_\_ x **0.8464**

Subtotal Deductions allocable to excluded income \_\_\_\_\_ **7,913**

Moving expenses allocable to excluded income:

Connected to 2021 and 2022. See worksheet provided above.	_____
Connected to 2022 and 2023. See worksheet provided above.	_____
<b>Total moving expenses allocable to excluded income</b>	<b>7,913</b>

Form 2555, line 44, deductions allocable to excluded income \_\_\_\_\_ **7,913**

Form <b>2555</b>	<b>Foreign Earned Income Tax Worksheets</b>	<b>2022</b>
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Name <b>Thomas J. Woodard</b>	Taxpayer Identification Number <b>[REDACTED]</b>
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If Form 1040 or 1040-SR, line 15, is zero, do not complete this worksheet.

**Foreign Earned Income Tax Worksheet - 1040 Line 16**

1. Enter the amount from Form 1040 or 1040-SR, line 15 .....	1.	17,504
2a. Enter the amount from your (and your spouse's, if filing jointly) Form 2555, lines 45 and 50 .....	2a.	104,087
b. Enter the total amount of any itemized deductions or exclusions you could not claim because they are related to excluded income .....	2b.	
c. Subtract line 2b from line 2a. If zero or less, enter -0- .....	2c.	104,087
3. Add lines 1 and 2c .....	3.	121,591
4. <b>Figure the tax on the amount on line 3.</b> Use the Tax Table, Tax Computation Worksheet, Schedule D Tax Worksheet, Qualified Dividends and Capital Gain Tax Worksheet,* or Form 8615, whichever applies. See the instructions for Form 1040 or 1040-SR, line 16 to see which tax computation method applies .....	4.	23,017
5. <b>Figure the tax on the amount on line 2c.</b> If the amount on line 2c is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 2c is \$100,000 or more, use the Tax Computation Worksheet. ....	5.	18,816
6. Subtract line 5 from line 4. If zero or less, enter -0-. Also include this amount on Form 1040 or 1040-SR, line 16 .....	6.	4,201

\*Enter the amount from line 3 above on line 1 of the Qualified Dividends and Capital Gain Tax Worksheet or Schedule D Tax Worksheet if you use either of these worksheets to figure the tax on line 3 above. Complete the rest of either of those worksheets, including any modifications for capital gain excess. Then, complete lines 5 and 6 above.

If Form 6251, line 6, is zero, do not complete this worksheet.

**AMT Foreign Earned Income Tax Worksheet - 6251 Line 7**

1. Enter the amount from Form 6251, line 6 .....	1.	
2a. Enter the amount from your (and your spouse's, if filing jointly) Form 2555, lines 45 and 50 .....	2a.	
b. Enter the total amount of any itemized deductions or exclusions you could not claim because they are related to excluded income .....	2b.	
c. Subtract line 2b from line 2a. If zero or less, enter -0- .....	2c.	
3. Add lines 1 and 2c .....	3.	
4. <b>Tax on the amount on line 3</b>		
<ul style="list-style-type: none"> <li>● If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; or 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 or 1040-SR) (as refigured for AMT, if necessary), enter the amount from line 3 of this worksheet on Form 6251, line 12. Then complete the rest of Part III of Form 6251 and enter the amount from line 40 here.</li> <li>● <b>All others:</b> If line 3 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 3 by 26% (.26). Otherwise, multiply line 3 by 28% (.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result.</li> </ul>	4.	
5. <b>Tax on amount on line 2c.</b> If line 2c is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 2c by 26% (0.26). Otherwise, multiply line 2c by 28% (.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result. ....	5.	
6. Subtract line 5 from line 4. Enter the result here and on Form 6251, line 7. If zero or less, enter -0- .....	6.	

**Federal Statements**

**WBA San Basilio, SdeRLdeCV**

**Foreign Earned Income Allocation - Business Income**

<u>Name</u>	<u>Type</u>	<u>US Earned During</u>	<u>Foreign Earned During</u>	<u>US Earned Before(After)</u>	<u>Foreign Earned Before(After)</u>
Consulting	Schedule C	\$	\$ 132,332	\$	\$
Total		\$ 0	\$ 132,332	\$ 0	\$ 0

**WBA San Basilio, SdeRLdeCV**

**Form 2555 Deduction Allocation - Employer-equivalent SE Tax**

<u>Name</u>	<u>Type</u>	<u>US Earned During</u>	<u>Foreign Earned During</u>	<u>US Earned Before(After)</u>	<u>Foreign Earned Before(After)</u>
Consulting	Schedule C	\$	\$ 9,349	\$	\$
Total		\$ 0	\$ 9,349	\$ 0	\$ 0

Form <b>1040</b>	<b>Standard Deduction &amp; Dependent MAGI Worksheets</b>	<b>2022</b>
------------------	---	-------------

Name <b>Thomas J. Woodard</b>	Taxpayer Identification Number 
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**Standard Deduction Worksheet**

1. Enter the amount shown below for your filing status.
  - Single or Married filing separately - \$12,950
  - Married filing jointly or qualifying widow(er) - \$25,900
  - Head of household - \$19,400

1. 12,950
  
2. Can you (or your spouse if married, filing jointly) be claimed as a dependent?
  - No.** Skip line 3; enter the amount from line 1 on line 4.
  - Yes.** Go to line 3.
  
3. Is your **earned income** more than \$750?
  - Yes.** Add \$400 to your earned income. Enter the total.
  - No.** Enter \$1,150

3. \_\_\_\_\_
  
4. Enter the **smaller** of line 1 or line 3. If under 65 and not blind, continue to line 6. **Otherwise**, go to line 5. 4. 12,950
  
5. Check if:  You were 65 or older,  Blind;  Spouse was 65 or older,  Blind. **Total boxes checked** 

5. 1,750

If 65 or older or blind, multiply \$1,400 (\$1,750 if single or head of household) by the number in the box above
  
6. Add lines 4 and 5. Enter the total here and on Form 1040 or 1040-SR, line 12 6. 14,700

**Dependent Modified Adjusted Gross Income Worksheet**

1. Are you required to file a tax return?
  - No.** Do not include Dependent's modified adjusted gross income in Claiming Taxpayer's household income.
  - Yes.** Include Modified Adjusted Gross Income in claiming taxpayer's household income.
  
2. **Adjusted Gross Income.** Enter the amount from Form 1040, Line 11 2. \_\_\_\_\_
  
3. Enter tax-exempt interest from Form 1040, line 2a 3. \_\_\_\_\_
  
4. Enter any amounts from your Form 2555, lines 45 and 50 4. \_\_\_\_\_
  
5. **Subtotal.** Combine lines 2 through 4 5. \_\_\_\_\_
  
6. Enter the total Social Security benefits from Form 1040, line 6a 6. \_\_\_\_\_
  
7. Enter the taxable Social Security benefits from Form 1040, line 6b 7. \_\_\_\_\_
  
8. Nontaxable Social Security benefits. Subtract line 7 from line 6 8. \_\_\_\_\_
  
9. **Dependent Modified Adjusted Gross Income for Claiming Taxpayer's Form 8962.**  
Add lines 5 and 8 9. \_\_\_\_\_

Form <b>1040</b>	<b>Net Earnings from Self-Employment Worksheet</b>	<b>2022</b>
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Name <b>Thomas J. Woodard</b>	Taxpayer Identification Number <div style="background-color: black; width: 100px; height: 15px;"></div>
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	Taxpayer	Spouse
<b>Farm profit or (loss)</b>		
Schedule F		
Farm Partnerships - Schedule K-1, box 14, code A		
Auto expense from farm partnerships	( )	( )
Amortization from farm partnerships	( )	( )
Depreciation & Section 179 from farm partnerships	( )	( )
Depletion from farm partnerships	( )	( )
Other expenses from farm partnerships	( )	( )
Home office expenses from farm partnerships	( )	( )
Unreimbursed partnership expenses from farm partnerships	( )	( )
Debt financed acquisition interest from farm partnerships	( )	( )
Farm adjustment to SE Income		
<b>Net farm profit or (loss) - Schedule SE line 1a</b>	<b>0</b>	<b>0</b>
<b>Conservation Reserve Program payments to social security/disability benefit recipients included on Sch F, in 4b or listed on Sch K-1 (Form 1065), box 20, code AH- Sch SE line 1b</b>	<b>( 0 )</b>	<b>( 0 )</b>
<b>Nonfarm profit or (loss)</b>		
Schedule C (excluding minister Schedule C income reported below)		
Nonfarm partnerships - Schedule K-1, box 14, code A	<b>132,332</b>	
Auto expense from nonfarm partnerships	( )	( )
Amortization from nonfarm partnerships	( )	( )
Depreciation & section 179 from nonfarm partnerships	( )	( )
Depletion from nonfarm partnerships	( )	( )
Other expenses from nonfarm partnerships	( )	( )
Home office expenses from nonfarm partnerships	( )	( )
Unreimbursed partnership expenses from nonfarm partnerships	( )	( )
Debt financed acquisition interest from nonfarm partnerships	( )	( )
Nonfarm adjustment to SE income		
Self-employment income reported as other income		
Self-employment income from contracts and straddles		
Minister/clergy self-employment income (from Clergy Worksheet Page 3, line 7)		
<b>Net nonfarm profit or (loss) - Schedule SE line 2</b>	<b>132,332</b>	<b>0</b>
<b>Other income items subject to and/or exempt from self-employment tax</b>		
Fees received for services performed as a notary public	( )	( )
Earnings while debtor in a chapter 11 bankruptcy case		
Taxable community property income/-loss		
Exempt community property income/-loss	( )	( )
<b>Net adjustment included on Schedule SE, line 3</b>	<b>0</b>	<b>0</b>
<b>Net profit (loss) from self-employment activities - Schedule SE line 3</b>	<b>132,332</b>	<b>0</b>
Church employee income - Schedule SE, Page 1 line 5a		

Form **1040** | **Reconciliation Worksheet - Taxable Income & Tax** | **2022**

Name **Thomas J. Woodard** | Taxpayer Identification Number [REDACTED]

Tax brackets are rates applied to specific levels of taxable income. Various rates apply to different portions of the total taxable income. Type of income, further determines the rate applied. Marginal Tax Rate is the tax paid on the highest level of taxable income. This worksheet details how tax is calculated on ordinary income and capital gain income, the percentage of taxable income, marginal tax rate and the tax method used.

Filing Status **Single** | Tax Pct Total Tax (In 27) divided Total Taxable Income (In 19) **24.0 %**  
 Tax Method **Foreign Earned Income Tax Worksheet**

Tax using ordinary and capital gains rates exceeds tax using only ordinary rates. Taxable income is taxed only using ordinary rates:  
 Tax using capital gains rates | Tax using Ordinary rates | Tax savings

	Taxable Amount	Marginal Tax Rate	Tax on Taxable Income	Marginal Tax Rate - Income Range	Amount of Income to Next Tax Bracket
Ordinary Income	121,591	24.0 %	23,017	\$89,075 - \$170,050	48,459
Capital Income		%			
Capital Income - 1250		%			
Capital Income - 1202		%			

\*Tax on taxable ordinary income under \$100,000 is determined using IRS Tax Tables that impose the same amount of tax on taxable income within \$50 intervals. Therefore, the column (b) Tax may not be calculated as column (a) times the applicable line tax rate.

Income taxed at ordinary rates	(a) Taxable Income	(b) Tax*
1. 10% rate Maximum taxable income per this bracket: \$10,275	1a. 10,275	1b. 1,028
2. 12% rate Maximum taxable income per this bracket: \$31,500	2a. 31,500	2b. 3,780
3. 22% rate Maximum taxable income per this bracket: \$47,300	3a. 47,300	3b. 10,406
4. 24% rate Maximum taxable income per this bracket: \$80,975	4a. 32,516	4b. 7,803
5. 32% rate	5a.	5b.
6. 35% rate	6a.	6b.
7. 37% rate	7a.	7b.
8. Total ordinary taxable income and ordinary tax. Add lines 1 through 7	8a. 121,591	8b. 23,017

Income taxed at capital gains rates	(a) Taxable Income	(b) Tax*
9. 0% capital gains rate	9a.	9b.
10. 15% capital gains rate	10a.	10b.
11. 20% capital gains rate	11a.	11b.
12. 25% capital gains rate Unrecaptured Section 1250 Gain	12a.	12b.
13. 28% capital gains rate Small business stock, collectibles	13a.	13b.
14. Total taxable capital gains and capital gains tax. Add lines 9 through 13	14a.	14b.

Total taxable income	(a) Taxable Income	(b) Tax*
15. Total ordinary taxable income. Enter the amount from line 8a.	15.	121,591
16. Total capital gains taxable income. Enter the amount from line 14a.	16.	
17. Add lines 15 and 16.	17.	121,591
18. Enter the net foreign exclusion amount from the Foreign Earned Income Tax Worksheet, line 2c.	18.	104,087
19. Taxable income reported on 1040/1040SR, line 15, (1040NR, line 15). Subtract line 18 from line 17.	19.	17,504

Total tax	(a) Taxable Income	(b) Tax*
20. Total ordinary tax. Enter the amount from line 8b.	20.	23,017
21. Total capital gains tax. Enter the amount from line 14b.	21.	
22. Tax on child's interest and dividend.	22.	
23. Tax on lump-sum distribution.	23.	
24. Other taxes.	24.	
25. Add lines 20 through 24.	25.	23,017
26. Enter the tax allocated to the net exclusion amount from the Foreign Earned Income Tax Worksheet, line 5.	26.	18,816
27. Total tax reported on 1040/1040SR, line 16, (1040NR, line 16). Subtract line 26 from line 25.	27.	4,201

<b>1040</b>	<b>Federal Return Summary</b>	<b>2022</b>
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Name **Thomas J. Woodard** Taxpayer Identification Number XXXXXXXXXX

Tax Form 1040  
 Tax Method Used For Earned Inc Tax Wrk

Filing Status SGL  
 Dependents \_\_\_\_\_

Income	
Salaries & wages	_____
Taxable interest income	_____
Tax exempt interest	_____
Dividend income	_____
Qualified dividends	_____
Taxable state/local refunds	_____
Alimony received	_____
Business income/-loss	<u>132,332</u>
Capital gain/-loss	_____
Other gain/-loss (Form 4797)	_____
Taxable IRA distributions	_____
Taxable pension distributions	<u>13,308</u>
Rental, royalty, partnership, etc. income/-loss	_____
Farm income/-loss	_____
Unemployment compensation	_____
Taxable social security benefits	_____
Other income	<u>-104,087</u>
<b>Total income</b>	<b><u>41,553</u></b>

Tax Computation	
Regular tax	<u>4,201</u>
Alternative minimum tax	_____
Excess advance premium tax credit	_____
Total tax before credits	<u>4,201</u>
Child and dependent care credit	_____
Education credits	_____
Other credits	_____
Total credits	_____
Tax after credits	<u>4,201</u>
Self-employment tax	<u>18,698</u>
Additional tax on IRAs, etc.	_____
Other taxes	_____
<b>Total tax</b>	<b><u>22,899</u></b>

Adjustments	
Moving expenses	_____
Deductible part of self-employment tax	<u>9,349</u>
SEP, SIMPLE, and qualified plan deduction	_____
Self-employed health insurance deduction	_____
Alimony paid	_____
IRA deduction	_____
Student loan interest deduction	_____
Other adjustments	_____
Total adjustments	<u>9,349</u>
<b>Adjusted gross income</b>	<b><u>32,204</u></b>

Payments	
Federal income tax withheld	_____
Estimated payments	_____
Other payments/credits	_____
<b>Total payments</b>	_____

Deductions	
Medical and Dental expenses	_____
Taxes paid	_____
Interest paid	_____
Charitable contributions	_____
Other itemized deductions	_____
Total itemized deductions	_____
or, Standard deduction	<u>14,700</u>
Taxable income before Qual Bus Inc Ded (QBID)	<u>17,504</u>
QBID	_____
<b>Taxable income</b>	<b><u>17,504</u></b>

Refund/Amount Due	
Amount overpaid	_____
Overpayment applied	_____
Form 2210 penalty	<u>358</u>
<b>Amount due/-refund</b>	<b><u>23,257</u></b>
Failure to file penalty	_____
Failure to pay penalty	_____
Late filing interest	_____
<b>Net amount due/-refund</b>	<b><u>23,257</u></b>

2023 Estimates	
1st quarter	_____
2nd quarter	_____
3rd quarter	_____
4th quarter	_____
<b>Total Estimates</b>	_____

Tax Rates	
Marginal tax rate - Ordinary income*	<u>24.0</u> %
Marginal tax rate - Capital income*	_____ %
Effective tax rate	<u>100.0</u> %

\* Marginal Tax Rate displayed may not reflect the true tax rate for Schedule J or Form 8615.

Form **1040** | **Two Year Comparison Report - Page 1** | **2021 & 2022**

Name **Thomas J. Woodard** | Taxpayer Identification Number [REDACTED]

	2021		2022		Differences
	SGL		SGL		
<b>Filing Status</b>					
<b>Dependents</b>					
1. Salaries and wages	1.				
2. Interest income	2.				
3. Tax exempt interest income	3.				
4. Dividend income	4.				
5. Qualified dividend income	5.				
6. Taxable state/local refunds	6.				
7. Alimony received	7.				
8. Business income/loss	8.	62,793	132,332	69,539	
9. Capital gain/loss	9.				
10. Other gains/losses	10.				
11. Taxable IRA distributions	11.				
12. Taxable pensions	12.	13,340	13,308	-32	
13. Rent and royalty income including farm rental	13.				
14. Partnership/S corp income	14.				
15. Estate or trust income	15.				
16. Farm income/loss	16.				
17. Unemployment compensation	17.				
18. Taxable social security	18.				
19. Other income	19.	-58,356	-104,087	-45,731	
20. <b>Total income</b>	20.	17,777	41,553	23,776	
<b>Adjustments</b>					
21. Moving expenses	21.				
22. Deductible part of self-employment tax	22.	4,437	9,349	4,912	
23. SEP/SIMPLE/Qualified plans deductions	23.				
24. SE health insurance	24.				
25. Penalty on early withdrawal of savings	25.				
26. Alimony paid	26.				
27. IRA deductions	27.				
28. Student loan interest	28.				
29. Other adjustments	29.				
30. <b>Adjusted gross income</b>	30.	13,340	32,204	18,864	
<b>Deductions</b>					
31. Medical	31.				
32. Taxes	32.	314	647	333	
33. Interest	33.				
34. Contributions	34.				
35. Casualty losses	35.				
36. Miscellaneous expenses	36.				
37. <b>Allowable itemized deductions</b>	37.	314	647	333	
38. Standard deduction	38.	14,250	14,700	450	
		Standard	Standard		
39. Deduction taken	39.	14,250	14,700	450	
40. Taxable income before Qual Bus Inc Ded (QBID)	40.	0	17,504	17,504	
41. QBID	41.	0	0		
42. <b>Taxable income</b>	42.	0	17,504	17,504	

Form <b>1040</b>	<b>Two Year Comparison Report - Page 2</b>	<b>2021 &amp; 2022</b>
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Name **Thomas J. Woodard** Taxpayer Identification Number [REDACTED]

		2021	2022	Differences
43. Taxable income from 2YR page 1, line 42	43.	0	17,504	17,504
44. Tax on taxable income	44.	0	4,201	4,201
45. Alternative minimum tax	45.			
46. Excess advance premium tax credit	46.			
47. Child care credit	47.			
48. Education credits	48.			
T 49. Retirement savings credit	49.			
a 50. Child & other dependent tax credit	50.			
x 51. General business credit	51.			
52. Other credits	52.			
C 53. Total credits	53.			
o 54. Net tax liability	54.		4,201	4,201
m 55. Self-employment taxes	55.	8,873	18,698	9,825
p 56. Other taxes	56.			
u 57. Total tax	57.	8,873	22,899	14,026
t 58. Income tax withheld	58.			
a 59. Estimated tax payments	59.			
t 60. Earned income credit	60.			
i 61. Additional Child tax credit	61.			
o 62. Other refundable tax credits	62.			
n 63. Other payments	63.	18,000		-18,000
64. Total payments	64.	18,000		-18,000
65. Tax due/-refund	65.	-9,127	22,899	32,026
66. Penalties and interest	66.	160	358	198
67. Net tax due/-refund	67.	-8,967	23,257	32,224
68. Refund applied to estimated tax payments	68.			
69. Refund received	69.	-8,967		8,967
70. Effective tax rate	70.	%	100.0 %	

**Two Year Comparison - Tax Reconciliation Marginal Tax Rates**

	2021	2021 Marginal	2022	2022 Marginal
	Taxable Income	Tax Rate	Taxable Income	Tax Rate
Ordinary income		%	121,591	24.0 %
Capital income		%		%
Capital - Sec. 1250		%		%
Capital - Sec. 1202		%		%

Form <b>1040</b>	<b>Two Year Comparison Report - Schedule C</b>	<b>2021 &amp; 2022</b>
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Name **Thomas J. Woodard** Taxpayer identification number [REDACTED]

Principal business or profession **Consulting** Unit **1**

		2021	2022	Differences
<b>Income</b>				
1. Gross receipts or sales	1.	62,793	132,332	69,539
2. Returns and allowances	2.			
3. Cost of goods sold	3.			
4. Gross profit	4.	62,793	132,332	69,539
5. Other income	5.			
6. Gross income	6.	62,793	132,332	69,539

<b>Expenses</b>				
7. Advertising	7.			
8. Car and truck expenses	8.			
9. Commissions and fees	9.			
10. Contract labor	10.			
11. Depletion	11.			
12. Depreciation and section 179 expense deduction	12.			
13. Employee benefit programs	13.			
14. Insurance (other than health)	14.			
15. Interest - mortgage (paid to banks, etc.)	15.			
16. Interest - other	16.			
17. Legal and professional services	17.			
18. Office expense	18.			
19. Pension and profit-sharing plans	19.			
20. Rent or lease - vehicles, machinery, and equipment	20.			
21. Rent or lease - other business property	21.			
22. Repairs and maintenance	22.			
23. Supplies (not included in cost of goods sold)	23.			
24. Taxes and licenses	24.			
25. Travel	25.			
26. Total meals and entertainment	26.			
26a. Nondeductible meals and entertainment	26a.			
26b. Deductible meals and entertainment	26b.			
27. Utilities	27.			
28. Wages (less employment credits)	28.			
29. Other expenses	29.			
30. Total expenses	30.			

<b>Profit/ (loss)</b>				
31. Tentative profit (loss)	31.	62,793	132,332	69,539
32. Expenses for business use of home	32.			
33. Net profit or (loss)	33.	62,793	132,332	69,539

<b>Cost of Goods Sold</b>				
34. Inventory - Beginning of year	34.			
35. Purchases	35.			
36. Labor	36.			
37. Materials	37.			
38. Other costs	38.			
39. Goods available for sale (sum of lines 34-38)	39.			
40. Inventory - End of year	40.			