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

" lan 1	Dec 31 20	023, or other tax ye	ar beginning	'	ending _			See	e se	oarate i	nstruction	ıs.	
							our social security number						
		nitial		Last name				Spc	use'	s social	security no	umbe	er
			k, see instructions.			Apt. no.		Duc	اماد	ntial E	lastian Ca		
			,								l ection C a you, or yo		aign
-		address, al	so complete spaces	below. State		ZIP code		spo	ouse	if filing	jointly, w	vant	
								box	k bel	ow will	not chan		и
Foreign country name			Foreign province/sta	ate/county		Foreign postal cod	de	you	ır ta	x or ref	1	_	
FIII. CL. I. F											You	S	pouse
F	X Single				d of hous	sehold (HOH)							
Check only one box.	_	filing jointly (even											19
L		filing separately (N	(*)	Qua your spouse. If you che		rviving spouse (ne c	hild	s name	if the au	alifu	ina
		child but not your			onca tric	11011 01 000 00	x, criter ti	10 0	illiu	3 Harric	in the qu	amy	irig
				a reward, award, or pa] voc	X۱	le le
			of a digital asset ou as a dependen	(or a financial interest			instruction	ıs.).	• • •	L	Yes	ΛΙ	10
Deduction	Omeone car Spouse it			were a dual-status alie		dependent							
Age/Blindness Y		Were born before .			Spouse:	Was born b	efore Janu	ıary	2.	1959	Is blin	nd	
Dependents (see				(2) Social security	(3)	Relationship			_		lifies for (se	ee in	structions):
	st name	Last	name	number	1050 80	to you	Chil	d ta	x cre	dit	Credit for other dependent		
than four dependents,													
see instructions			-0										
and check							1	L	_			Н	
here				L									
Income				x 1 (see instruction						1a			
Attach Form(s)			20 Aug 2000 AC	oorted on Form(s) V						1b			
W-2 here. Also	c Tip	Tip income not reported on line 1a (see instructions)					1c						
attach Forms W-2G and		edicaid waiver payments not reported on Form(s) W-2 (see instructions)						1d					
1099-R if tax		Taxable dependent care benefits from Form 2441, line 26					1e						
was withheld.		ployer-provided adoption benefits from Form 8839, line 29						1f					
If you did not get a Form	-	= ∅	from Form 8919, line 6						1g				
W-2; see			earned income (see instructions)					1h					
instructions.		ntaxable combat d lines 1a throug								1z			
Attach		e-exempt interest	1 1	2,19	1	axable interest				2b			3,244.
Sch. B if required.			<i>3</i>	7,39		rdinary dividen						1	
required.		alified dividends		1,33.		axable amount				3b 4b			0,565.
		nsions and annui	5 to 50 50 50 10 10 10 10 10 10 10 10 10 10 10 10 10			axable amount				5b			
w	30 3 535	ARA BARRA BARRANA		30 61						6b			6,073.
			curity benefits[6a] ect to use the lump-sum election met			30,611. b Taxable amount			Ϊ	OD			0,073.
	-		•	equired. If not required, o		-			П	7			4,540.
Standard		- 1 1		, line 10						8			
Deduction for — Single or	1		1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income						9		2	24,422.	
Married filing separately, \$13,850				lule 1, line 26						10			
Married filing	11 Subtract line 10 from line 9. This is your adjusted gross income						11	ñ	2	24,422.			
jointly or Qualifying surviving spouse, \$27,700						12	0		7,102.				
Head of		ualified business income deduction from Form 8995 or Form 8995-A					13			,			
household, \$20,800 If you checked any box under Standard										14		1	7,102.
box under Standard Deduction, see instructions.													
See maductions.	115 Sut	otract line 14 from	m line II. If zer	o or less, enter -0	This is	vour taxable in	come		1 2 2	15			7.320

SCHEDULE B (Form 1040)

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

Interest and Ordinary Dividends

Attach to Form 1040 or 1040-SR. Go to www.irs.gov/ScheduleB for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment Sequence No. 08

Your social security number

Part I	1	List name of payer. If any interest is from a seller-financed mortgage and the buyer used		Amo	unt		
	1	the property as a personal residence, see the instructions and list this interest first. Also,		AIIIU	- WIII		
Interest		show that buyer's social security number and address: CHASE				7.	
(See instructions and the		EDWARD JONES				64.	
Instructions for		EVERGREEN NOTE SERVICING	1	- 4. ***	1,7		
Form 1040, line 2b.)		HAPO CREDIT UNION			1,4		
,		LPL FINANCIAL				3.	
Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.			1				
	2	Add the amounts on line 1	2		3.2	244.	
	3	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach					
		Form 8815	3		2 2		
		Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b	4	Amo	<u>-</u>	244.	
Part II		List name of payer:		, , , , , ,			
	Ī	EDWARD JONES	1 1		1,5	62.	
Ordinary Dividends		EDWARD JONES				.62.	
Dividends		LPL FINANCIAL] [8	341.	
(See instructions]				
and the Instructions for							
Form 1040,			4				
line 3b.)			-				
			-				
Note: If you			5				
received a							
Form 1099-DIV or substitute statement							
from a brokerage firm, list the firm's							
name as the payer]		•		
and enter the ordinary dividends							
shown on that form.							
			4		~~~~~		
			-				
	c	Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b	6		10,5	565	
	Mote	e: If line 6 is over \$1,500, you must complete Part III.	. 0	'	10,0	,05.	
Part III			I-X II			1	
Foreign	You (c) r	must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (eceived a distribution from, or were a grantor of, or a transferor to, a foreign trust.	nau (a	a foreign a	ccoun	t; or	
Accounts					Yes	No	
and Trusts	7a	At any time during 2023, did you have a financial interest in or signature authority over a fir account (such as a bank account, securities account, or brokerage account) located in a for	ancial				
Caution: If required, failure to file FinCEN		See instructions					
Form 114 may		If 'Yes,' are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing					
result in substantial penalties.		to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements					
Additionally, you may be required to file	ŀ	b If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial					
Form 8938, Statemen	t	account(s) is (are) located:					
of Specified Foreign Financial Assets. See instructions.	8 During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If 'Yes,' you may have to file Form 3520. See instructions						

SCHEDULE D (Form 1040)

Department of the Treasury

Capital Gains and Losses

Attach to Form 1040, 1040-SR, or 1040-NR. Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10. OMB No. 1545-0074

Attachment Sequence No. Internal Revenue Service Go to www.irs.gov/ScheduleD for instructions and the latest information. Name(s) shown on return Your social security number X No Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? If "Yes." attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss Short-Term Capital Gains and Losses - Generally Assets Held One Year or Less (see instructions) Part I (g) Adjustments (h) Gain or (loss) See instructions for how to figure the amounts to Subtract column (e) enter on the lines below. (d) (e) to gain or loss from Proceeds Cost from column (d) and This form may be easier to complete if you round Form(s) 8949, Part I, (sales price) (or other basis) combine the result off cents to whole dollars. line 2, column (g) 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..... 22,276. 591. 22,867. 1b Totals for all transactions reported on Form(s) 8949 with Box A checked..... Totals for all transactions reported on Form(s) 8949 with Box B checked. . . . 3 Totals for all transactions reported on Form(s) 8949 with Box C checked..... 4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824...... 4 5 5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1. Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions... 6 2,008.) 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 the back...... -1,417.Long-Term Capital Gains and Losses — Generally Assets Held More Than One Year (see instructions) See instructions for how to figure the amounts to (h) Gain or (loss) Adjustments Subtract column (e) enter on the lines below. (d) to gain or loss from Form(s) 8949, Part II, line 2, column (g) Proceeds Cost from column (d) and This form may be easier to complete if you round (sales price) (or other basis) combine the result off cents to whole dollars. 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..... Totals for all transactions reported on Form(s) 8949 with Box D checked 301,502. 291,326. 11. 10,187. Totals for all transactions reported on Form(s) 8949 with Box E checked Totals for all transactions reported on Form(s) 8949 with Box F checked Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from 11 11 Forms 4684, 6781, and 8824..... 12 12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.... 13 2,792. Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover 7,022.)Worksheet in the instructions 14 15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on

5,957.

art	Summary		
16	Combine lines 7 and 15 and enter the result	16	4,540.
	• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.		· · · · · · · · · · · · · · · · · · ·
	 If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. 		
	 If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22. 		
17	Are lines 15 and 16 both gains?		
	X Yes. Go to line 18.		
	No. Skip lines 18 through 21, and go to line 22.		
18	If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet	18	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	
20	Are lines 18 and 19 both zero or blank and you are not filing Form 4952?		
	Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below.		
	No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:	ļ	
	• The loss on line 16; or	21	(
	• (\$3,000), or if married filing separately, (\$1,500)		
	Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?		
	Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16.		

No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.

Schedule D (Form 1040) 2023

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side

SSN or taxpayer identification number

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

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, of Form 8949, page 2, for each complete as many forms with	or F below. Check of applicable box. If he the same box ch	only one box. If n you have more lo necked as you nee	nore than one box ong-term transacti ed.	applies for your ons than will fit o	long-term to n this page	ransactions, comp for one or more o	olete a separate of the boxes,	
X (D) Long-term transa								
(E) Long-term transa	ctions reported on	Form(s) 1099-B :	showing basis wa	sn't reported to the	ne IRS			
(F) Long-term transa	ctions not reported	d to you on Form	1099-B					
1 (a) Description of property (Example: 100 shares XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis See the Note below	Adjustment, If you enter an enter a co See the sep	(h) Gain or (loss) Subtract column (e) from column (d) and		
			(see instructions)	and see <i>Column (e)</i> in the separate instructions.	(f) Code(s) from instructions	(g) Amount of adjustment	combine the result with column (g).	
EDWARD JONES LONG	TERM COVERE							
	VARIOUS	VARIOUS	223,879.	220,965.	W	8.	2,922.	
EDWARD JONES LONG	TERM COVERE							
	VARIOUS	VARIOUS	77,623.	70,361.	W	3.	7,265.	
•								
	,							
	Thereen white the second secon							
2 Totals. Add the amounts	s in columns (d), (e	e), (g), and (h)						

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

301,502.

291,326.

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)......

10,187.