FORM 6 FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTERESTS 2020

Please print or type your name, mailing address, agency name, and position below:

FOR OFFICE USE ONLY:

FLORIDA COMMISSION ON ETHICS
JUL 12 2021
RECEIVED

PROCESSED 222306

LAST NAME — FIRST NAME — MIDDLE NAME:
Weiss Gregg Kenneth

MAILING ADDRESS:
301 N. Olive Ave

CITY: West Palm Beach
ZIP: 33401
COUNTY: Palm Beach

NAME OF AGENCY:
Palm Beach County Board of County Commissioners

NAME OF OFFICE OR POSITION HELD OR SOUGHT:
Commissioner, District 2

CHECK IF THIS IS A FILING BY A CANDIDATE ☐

PART A -- NET WORTH

Please enter the value of your net worth as of December 31, 2020 or a more current date. [Note: Net worth is not calculated by subtracting your *reported* liabilities from your *reported* assets, so please see the instructions on page 3.]

My net worth as of December 31, 20 20 was $ 6,226,979.

PART B -- ASSETS

HOUSEHOLD GOODS AND PERSONAL EFFECTS:

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds $1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effects (described above) is $ 80,000

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
Merrill Lynch Brokerage account	3,204,928
Wells Fargo Checking	46,428
Retirement Account: TIAA	214,419
Real Estate and residence (see attached)	3,749,730

PART C -- LIABILITIES

LIABILITIES IN EXCESS OF $1,000 (See instructions on page 4):

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
Freemont Bank, 580 Shea Center Dr., Livermore, CA 94551	528,305
Specialized Loan Servicing, LLC, PO Box 636005, Littleton, CO 80163	381,642
Merrill Lynch, 250 Vessy St., New York City, New York	158,579

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
None	

PART D -- INCOME

Identify each separate source and amount of income which exceeded $1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2020 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☑ I elect to file a copy of my 2020 federal income tax return and all W2's, schedules, and attachments.
[If you check this box and attach a copy of your 2020 tax return, you need not complete the remainder of Part D.]

PRIMARY SOURCES OF INCOME (See instructions on page 5):

NAME OF SOURCE OF INCOME EXCEEDING $1,000	ADDRESS OF SOURCE OF INCOME	AMOUNT

SECONDARY SOURCES OF INCOME [Major customers, clients, etc., of businesses owned by reporting person--see instructions on page 5]:

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE

PART E -- INTERESTS IN SPECIFIED BUSINESSES [Instructions on page 6]

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY			
ADDRESS OF BUSINESS ENTITY			
PRINCIPAL BUSINESS ACTIVITY			
POSITION HELD WITH ENTITY			
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

PART F - TRAINING

This section applies only to officers required to complete annual ethics training pursuant to section 112.3142, F.S. [See instructions p. 6]

☑ **I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.**

OATH

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed on this form and any attachments hereto is true, accurate, and complete.

SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

STATE OF FLORIDA
COUNTY OF July

Sworn to (or affirmed) and subscribed before me by means of ☐ physical presence or ☐ online notarization, this 7th day of July, 2021 by

(Signature of Notary Public--State of Florida)

(Print, Type, or Stamp Commissioned Name of Notary Public) GG 921412

Personally Known ✓ OR Produced Identification

Type of Identification Produced

TAMMI UNDERWOOD WILKINS MY COMMISSION EXPIRES OCTOBER 12, 2023 Bonded thru Troy Fain Insurance NOTARY PUBLIC, STATE OF FLORIDA

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, _____, prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Signature _____ Date _____

Preparation of this form by a CPA or attorney does not relieve the filer of the responsibility to sign the form under oath.

IF ANY OF PARTS A THROUGH E ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE ☐

Gregg K Weiss 2020 Form 6 Attachment

Real Estate

Address	Market Value
615 Kanuga Dr, West Palm Beach, FL	$905,240
721 Kanuga Dr, West Palm Beach, FL	$560,740
221 35th St., Newport Beach, CA	$2,283,750

Form **1040** Department of the Treasury - Internal Revenue Service (99)

U.S. Individual Income Tax Return

2020 OMB No. 1545-0074 IRS Use Only - Do not write or staple in this space.

Filing Status ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial	Last name	Your social security number
GREGG K.	WEISS	[redacted]
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
REBECCA M.	WEISS	[redacted]

Home address (number and street). If you have a P.O. box, see instructions. Apt. no.
615 KANUGA DRIVE

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code
WEST PALM BEACH FL 33401

Foreign country name | Foreign province/state/county | Foreign postal code

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

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ☐ Yes ☒ No

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

Age/Blindness **You:** ☐ Were born before January 2, 1956 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1956 ☐ Is blind

Dependents (see instructions): If more than four dependents, see instr. and check here ▶ ☐

(1) First name Last name	(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see instructions): Child tax credit	Credit for other dependents

Attach Sch. B if required.

1	Wages, salaries, tips, etc. Attach Form(s) W-2 STMT 1				1	129,236.
2a	Tax-exempt interest	2a		b Taxable interest	2b	566.
3a	Qualified dividends	3a	36,649.	b Ordinary dividends	3b	46,672.
4a	IRA distributions	4a		b Taxable amount	4b	
5a	Pensions and annuities	5a		b Taxable amount	5b	
6a	Social security benefits	6a		b Taxable amount	6b	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐				7	89,057.
8	Other income from Schedule 1, line 9				8	34,456.
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** ▶				9	299,987.
10	Adjustments to income:					
a	From Schedule 1, line 22	10a				
b	Charitable contributions if you take the standard deduction. See instr.	10b				
c	Add lines 10a and 10b. These are your **total adjustments to income** ▶				10c	
11	Subtract line 10c from line 9. This is your **adjusted gross income** ▶				11	299,987.
12	**Standard deduction or itemized deductions** (from Schedule A)				12	34,312.
13	Qualified business income deduction. Attach Form 8995 or Form 8995-A				13	116.
14	Add lines 12 and 13				14	34,428.
15	**Taxable income.** Subtract line 14 from line 11. If zero or less, enter -0-				15	265,559.

Standard Deduction for -
- Single or Married filing separately, $12,400
- Married filing jointly or Qualifying widow(er), $24,800
- Head of household, $18,650
- If you checked any box under Standard Deduction, see instructions.

LHA **For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.** Form **1040** (2020)

013921 12-11-20

STMT 3

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐			16	41,204.
17	Amount from Schedule 2, line 3			17	
18	Add lines 16 and 17			18	41,204.
19	Child tax credit or credit for other dependents			19	
20	Amount from Schedule 3, line 7			20	
21	Add lines 19 and 20			21	
22	Subtract line 21 from line 18. If zero or less, enter -0-			22	41,204.
23	Other taxes, including self-employment tax, from Schedule 2, line 10			23	1,900.
24	Add lines 22 and 23. This is your total tax ▶			24	43,104.
25	Federal income tax withheld from:				
a	Form(s) W-2 SEE STATEMENT 4	25a	16,185.		
b	Form(s) 1099	25b			
c	Other forms (see instructions)	25c			
d	Add lines 25a through 25c			25d	16,185.
26	2020 estimated tax payments and amount applied from 2019 return			26	
27	Earned income credit (EIC)	27			
28	Additional child tax credit. Attach Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Recovery rebate credit. See instructions	30			
31	Amount from Schedule 3, line 13	31			
32	Add lines 27 through 31. These are your **total other payments and refundable credits** ▶			32	
33	Add lines 25d, 26, and 32. These are your **total payments** ▶			33	16,185.

● If you have a qualifying child, attach Sch. EIC.
● If you have nontaxable combat pay, see instructions

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 ▶ ☐			35a	
b	▶ Routing number	c Type: ☐ Checking ☐ Savings			
d	▶ Account number				
36	Amount of line 34 you want **applied to your 2021 estimated tax** ▶	36			

Direct deposit? See instructions.

Amount You Owe

37	Subtract line 33 from line 24. This is the **amount you owe now** ▶			37	27,313.
	Note: Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.				
38	Estimated tax penalty (see instructions) ▶	38	394.		

For details on how to pay, see instructions.

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 ▶ PETER H. BOZETARNIK Phone no. ▶ 561-253-7885 Personal identification number (PIN) ▶ 12345

Sign Here

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		COUNTY COMMISSIONER	▶
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
		DEVELOPMENT MANAGER	▶
Phone no.	Email address		

Joint return? See instructions. Keep a copy for your records.

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if:
PETER H. BOZETARNIK			P00343808	☒ Self-employed

Firm's name ▶ BOZETARNIK & COMPANY, LLP Phone no. 561-253-7885

Firm's address ▶ TWO HARVARD CIRCLE, SUITE 400 WEST PALM BEACH, FL 33409 ▶ Firm's EIN 45-4639436

Go to *www.irs.gov/Form1040* for instructions and the latest information. Form **1040** (2020)

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 for instructions and the latest information.

OMB No. 1545-0074

2020

Attachment Sequence No. 01

Name(s) shown on Form 1040, 1040-SR, or 1040-NR
GREGG K. & REBECCA M. WEISS

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	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	34,456.
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income. List type and amount ▶	8	
9	Combine lines 1 through 8. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	9	34,456.

Part II Adjustments to Income

10	Educator expenses	10	
11	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	11	
12	Health savings account deduction. Attach Form 8889	12	
13	Moving expenses for members of the Armed Forces. Attach Form 3903	13	
14	Deductible part of self-employment tax. Attach Schedule SE	14	
15	Self-employed SEP, SIMPLE, and qualified plans	15	
16	Self-employed health insurance deduction	16	
17	Penalty on early withdrawal of savings	17	
18a	Alimony paid	18a	
b	Recipient's SSN ▶		
c	Date of original divorce or separation agreement (see instructions) ▶		
19	IRA deduction	19	
20	Student loan interest deduction	20	
21	Tuition and fees deduction. Attach Form 8917	21	
22	Add lines 10 through 21. These are your **adjustments to income.** Enter here and on Form 1040, 1040-SR, or 1040-NR, line 10a	22	

SCHEDULE 2
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Taxes

▶ **Attach to Form 1040, 1040-SR, or 1040-NR.**
▶ **Go to www.irs.gov/Form1040 for instructions and the latest information.**

OMB No. 1545-0074

2020

Attachment Sequence No. **02**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR
GREGG K. & REBECCA M. WEISS

Your social security number [redacted]

Part I Tax

1	Alternative minimum tax. Attach Form 6251	1	
2	Excess advance premium tax credit repayment. Attach Form 8962	2	
3	Add lines 1 and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17	3	0.

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4	
5	Unreported social security and Medicare tax from Form: a ☐ 4137 b ☐ 8919	5	
6	Additional tax on IRAs, other qualified retirement plans, and other tax-favored accounts. Attach Form 5329 if required	6	
7a	Household employment taxes. Attach Schedule H	7a	
b	Repayment of first-time homebuyer credit from Form 5405. Attach Form 5405 if required	7b	
8	Taxes from: a ☐ Form 8959 b ☒ Form 8960 c ☐ Instructions; enter code(s)	8	1,900.
9	Section 965 net tax liability installment from Form 965-A 9		
10	Add lines 4 through 8. These are your **total other taxes.** Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b	10	1,900.

LHA **For Paperwork Reduction Act Notice, see your tax return instructions.** **Schedule 2 (Form 1040) 2020**

013924 12-11-20

Recovery Rebate Credit Worksheet - Line 30

Name(s) shown on return	Your SSN
GREGG K. & REBECCA M. WEISS	[redacted]

Before you begin: ✓ See the instructions for line 30 to find out if you can take this credit and for definitions and other information needed to fill out this worksheet.
✓ If you received Notice 1444 and Notice 1444-B, have them available.

Don't include on line 16 or 19 any amount you received but later returned to the IRS.

1. Can you be claimed as a dependent on another person's 2020 return? If filing a joint return, go to line 2.
   - [X] **No.** Go to line 2.
   - [ ] **Yes.** Stop. You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.
2. Does your 2020 return include a valid social security number (defined under *Valid social security number,* earlier) for you and, if filing a joint return, your spouse?
   - [X] **Yes.** Skip lines 3 and 4, and go to line 5.
     If you are filing a joint return, go to line 3.
   - [ ] **No.** If you aren't filing a joint return, STOP you can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.
3. Was at least one of you a member of the U.S. Armed Forces at any time during 2020, and does at least one of you have a valid social security number (defined under *Valid social security number,* earlier)?
   - [ ] **Yes.** Your credit is not limited. Go to line 5.
   - [ ] **No.** Go to line 4.
4. Does one of you have a valid social security number (defined under *Valid social security number,* earlier)?
   - [ ] **Yes.** Your credit is limited. Go to line 5.
   - [ ] **No.** Stop. You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.
5. If your EIP 1 was $1,200 ($2,400 if married filing jointly) plus $500 for each qualifying child you had in 2020, skip lines 5 and 6, enter zero on lines 7 and 16, and go to line 8. Otherwise, enter:
   - $1,200 if single, head of household, married filing separately, qualifying widow(er), or if married filing jointly and you answered "Yes" to question 4, or
   - $2,400 if married filing jointly and you answered "Yes" to question 2 or 3 ..... 5. _____
6. Multiply $500 by the number of qualifying children under age 17 at the end of 2020 listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you either checked the "Child tax credit" box or entered an adoption taxpayer identification number ..... 6. _____
7. Add lines 5 and 6 ..... 7. 0.
8. If your EIP 2 was $600 ($1,200 if married filing jointly) plus $600 for each qualifying child you had in 2020, skip lines 8 and 9, enter zero on lines 10 and 19, and go to line 11. Otherwise, enter:
   - $600 if single, head of household, married filing separately, qualifying widow(er), or if married filing jointly and you answered "Yes" to question 4, or
   - $1,200 if married filing jointly and you answered "Yes" to question 2 or 3 ..... 8. _____
9. Multiply $600 by the number of qualifying children under age 17 at the end of 2020 listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you either checked the "Child tax credit" box or entered an adoption taxpayer identification number ..... 9. _____
10. Add lines 8 and 9 ..... 10. 0.
11. Enter the amount from line 11 of Form 1040 or 1040-SR ..... 11. 299,987.
12. Enter the amount shown below for your filing status:
    - $150,000 if married filing jointly or qualifying widow(er)
    - $112,500 if head of household
    - $75,000 if single or married filing separately
    ..... 12. 150,000.
13. Is the amount on line 11 more than the amount on line 12?
    - [ ] **No.** Skip line 14. Enter the amount from line 7 on line 15 and the amount from line 10 on line 18.
    - [X] **Yes.** Subtract line 12 from line 11. 13. 149,987.
14. Multiply line 13 by 5% (0.05) ..... 14. 7,499.
15. Subtract line 14 from line 7. If zero or less, enter -0- ..... 15. 0.
16. Enter the amount, if any, of EIP 1 that was issued to you (before offset for any past-due child support payment). You may refer to Notice 1444 or your tax account information at *IRS.gov/Account* for the amount to enter here ..... 16. 0.
17. Subtract line 16 from line 15. If zero or less, enter -0-. If line 16 is more than line 15, you don't have to pay back the difference ..... 17. 0.
18. Subtract line 14 from line 10. If zero or less, enter -0- ..... 18. 0.
19. Enter the amount, if any, of EIP 2 that was issued to you. You may refer to Notice 1444-B or your tax account information at IRS.gov/Account for the amount to enter here ..... 19. 0.
20. Subtract line 19 from line 18. If zero or less, enter -0-. If line 19 is more than line 18, you don't have to pay back the difference ..... 20. 0.
21. **Recovery rebate credit.** Add lines 17 and 20. Enter the result here and, if more than zero, on line 30 of Form 1040 or 1040-SR ..... 21. 0.

Form **2210**

Department of the Treasury
Internal Revenue Service

Underpayment of Estimated Tax by Individuals, Estates, and Trusts

▶ Go to www.irs.gov/Form2210 for instructions and the latest information.

▶ Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

OMB No.1545-0074

2020

Attachment Sequence No. **06**

Name(s) shown on tax return

GREGG K. & REBECCA M. WEISS

Identifying number

[redacted]

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 or Part IV as a worksheet and enter your penalty amount on your tax return, but **don't file Form 2210.**

From "You must file Form 2210. Does box B, C, or D in Part II apply?": **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 or Part IV as a worksheet and enter your penalty amount on your tax return, but **file only page 1 of Form 2210.**

From "You must file Form 2210. Does box B, C, or D in Part II apply?": **Yes** → You must figure your penalty.

Part I Required Annual Payment

1	Enter your 2020 tax after credits from Form 1040, 1040-SR, or 1040-NR, line 22. (See the *instructions if not filing Form 1040.*)		1	41,204.
2	Other taxes, including the portion of 2020 self-employment tax to which the estimated tax requirement applies and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)		2	1,900.
3	Refundable credits, including the *premium tax credit (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. **Don't** file Form 2210		4	43,104.
5	Multiply line 4 by 90% (0.90)	5 38,794.		
6	Withholding taxes. **Don't** include estimated tax payments. See instructions		6	16,185.
7	Subtract line 6 from line 4. If less than $1,000, **stop;** you don't owe a penalty. **Don't** file Form 2210		7	26,919.
8	Maximum required annual payment based on prior year's tax (see instructions)		8	
9	**Required annual payment.** Enter the **smaller** of line 5 or line 8		9	38,794.

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 or IV 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 2019 or 2020, 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).

Part III Short Method

Can You Use the Short Method?

You can use the short method if:

- You made *no* estimated tax payments (or your only payments were withheld federal income tax), **or**
- You paid the same amount of estimated tax on each of the four payment due dates.

Must You Use the Regular Method?

You must use the regular method (Part IV) instead of the short method if:

- You made any estimated tax payments late,
- You checked box **C** or **D** in Part II, **or**
- You're filing Form 1040-NR and you didn't receive wages as an employee subject to U.S. income tax withholding.

Note: If any payment was made earlier than the due date, you can use the short method, but using it may cause you to pay a larger penalty than the regular method. If the payment was only a few days early, the difference is likely to be small.

10	Enter the amount from Form 2210, line 9			10	38,794.
11	Enter the amount, if any, from Form 2210, line 6	11	16,185.		
12	Enter the total amount, if any, of estimated tax payments you made	12			
13	Add lines 11 and 12			13	16,185.
14	**Total underpayment for year.** Subtract line 13 from line 10. If zero or less, **stop;** you don't owe a penalty. If the amount on line 14 was paid **on or before** 1/15/21, do not use the short method. **Don't file Form 2210 unless you checked box E in Part II**			14	22,609.
15	Multiply line 14 by 0.01744			15	394.
16	• If the amount on line 14 was paid **on or after** 4/15/21, enter -0-. • If the amount on line 14 was paid **after** 1/15/21 and **before** 4/15/21, make the following computation to find the amount to enter on line 16. Amount on line 14 x Number of days paid before 4/15/21 x 0.00008			16	0.
17	**Penalty.** Subtract line 16 from line 15. Enter the result here and 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** ▶			17	394.

Form **2210** (2020)

SCHEDULE A (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Itemized Deductions

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

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

OMB No. 1545-0074

2020

Attachment Sequence No. **07**

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

Your social security number [redacted]

GREGG K. & REBECCA M. WEISS

Medical and Dental Expenses		**Caution:** Do not include expenses reimbursed or paid by others.			
	1	Medical and dental expenses (see instructions) SEE STATEMENT 6	1	2,724.	
	2	Enter amount from Form 1040 or 1040-SR, line 11	2	299,987.	
	3	Multiply line 2 by 7.5% (0.075)	3	22,499.	
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4		0.
Taxes You Paid	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 SEE STATEMENT 8 ▶ [X]	5a	1,844.	
	b	State and local real estate taxes (see instructions) SEE STATEMENT 7	5b	15,180.	
	c	State and local personal property taxes	5c		
	d	Add lines 5a through 5c	5d	17,024.	
	e	Enter the smaller of line 5d or $10,000 ($5,000 if married filing separately)	5e	10,000.	
	6	Other taxes. List type and amount ▶	6		
	7	Add lines 5e and 6	7		10,000.
Interest You Paid	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 ▶ [ ]			
Caution: Your mortgage interest deduction may be limited (see instructions).	a	Home mortgage interest and points reported to you on Form 1098. See instructions if limited	8a	16,305.	
	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	Mortgage insurance premiums (see instructions)	8d		
	e	Add lines 8a through 8d	8e	16,305.	
	9	Investment interest. Attach Form 4952 if required. See instructions	9		
	10	Add lines 8e and 9	10		16,305.
Gifts to Charity	11	Gifts by cash or check. If you made any gift of $250 or more, see instructions	11	8,007.	STMT 5
Caution: If you made a gift and got a benefit for it, see instructions.	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		8,007.
Casualty and Theft Losses	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		
Other Itemized Deductions	16	Other - from list in instructions. List type and amount ▶	16		
Total Itemized Deductions	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		34,312.
	18	If you elect to itemize deductions even though they are less than your standard deduction, check this box ▶ [ ]			

SCHEDULE B (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Interest and Ordinary Dividends

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

▶ Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

2020

Attachment Sequence No. 08

Name(s) shown on return

Your social security number

GREGG K. & REBECCA M. WEISS [redacted]

Part I Interest

1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address ▶

	Amount
FREMONT BANK	421.
MERRILL - [redacted]	118.
MERRILL - [redacted]	25.
MORGAN STANLEY	2.
1	

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.

2	Add the amounts on line 1	2	566.
3	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3	
4	Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b ▶	4	566.

Note: If line 4 is over $1,500, you must complete Part III.

Part II Ordinary Dividends

5 List name of payer ▶

	Amount
MERRILL - [redacted]	21,028.
MERRILL - [redacted]	4,163.
MERRILL - [redacted]	1,574.
MERRILL - [redacted]	1,609.
MERRILL - [redacted]	2,330.
MERRILL - [redacted]	8,864.
MORGAN STANLEY	7,104.
5	

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

6	Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b ▶	6	46,672.

Note: If line 6 is over $1,500, you must complete Part III.

Part III Foreign Accounts and Trusts

Caution: If required, failure to file FinCEN Form 114 may result in substantial penalties. See instructions.

		Yes	No
	You must complete this part if you **(a)** had over $1,500 of taxable interest or ordinary dividends; **(b)** had a foreign account; or **(c)** received a distribution from, or were a grantor of, or a transferor to, a foreign trust.		
7a	At any time during 2020, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions		X
	If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		
b	If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located ▶		
8	During 2020, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions		X

SCHEDULE D
(Form 1040)
Department of the Treasury
Internal Revenue Service (99)

Capital Gains and Losses

▶ Attach to Form 1040, 1040-SR, or 1040-NR.
▶ Go to www.irs.gov/ScheduleD for instructions and the latest information.
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074
2020
Attachment Sequence No. 12

Name(s) shown on return

Your social security number

GREGG K. & REBECCA M. WEISS

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes ☒ No
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
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				
1b Totals for all transactions reported on Form(s) 8949 with **Box A** checked	477,761.	523,907.	141.	<46,005.>
2 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	Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5	
6	Short-term capital loss carryover. Enter the amount, if any, from line 8 of your **Capital Loss Carryover Worksheet** in the instructions	6	( )
7	**Net short-term capital gain or (loss).** Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2	7	<46,005.>

Part II Long-Term Capital Gains and Losses - Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
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				
8b Totals for all transactions reported on Form(s) 8949 with **Box D** checked	260,428.	196,067.	199.	64,560.
9 Totals for all transactions reported on Form(s) 8949 with **Box E** checked	95,162.	48,673.		46,489.
10 Totals for all transactions reported on Form(s) 8949 with **Box F** checked				

11	Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824	11	
12	Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	
13	Capital gain distributions SEE STATEMENT 10	13	24,013.
14	Long-term capital loss carryover. Enter the amount, if any, from line 13 of your **Capital Loss Carryover 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 page 2	15	135,062.

Part III Summary

16 Combine lines 7 and 15 and enter the result ..... **16** 89,057.

- 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**

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 are you not filing Form 4952?

[X] **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Forms 1040 and 1040-SR, line 16. **Don't** complete lines 21 and 22 below.

[ ] **No.** Complete the **Schedule D Tax Worksheet** in the instructions. **Don't** complete lines 21 and 22 below.

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

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

..... **21** ( )

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

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

[ ] **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Forms 1040 and 1040-SR, line 16.

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

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Go to www.irs.gov/Form8949 for instructions and the latest information.
▶ File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

OMB No. 1545-0074

2020

Attachment Sequence No. **12A**

Name(s) shown on return: GREGG K. & REBECCA M. WEISS

Social security number or taxpayer identification no. [redacted]

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

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

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

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

[X] **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

[ ] **(B)** Short-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

[ ] **(C)** Short-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions. (f) Code(s)	(g) Amount of adjustment	(h) Gain or (loss). Subtract column (e) from column (d) & combine the result with column (g)
MERRILL - 6100	VARIOUS	06/30/20	12,564.	14,360.			<1,796.>
MERRILL - 6100	VARIOUS	06/30/20	212,856.	233,282.			<20,426.>
MERRILL - 6105	VARIOUS	06/30/20	47,542.	50,707.			<3,165.>
MERRILL - 6106	VARIOUS	06/30/20	11,053.	11,087.	W	86.	52.
MERRILL - 6107	VARIOUS	06/30/20	26,349.	26,376.			<27.>
MERRILL - 6108	VARIOUS	06/30/20	44,025.	47,604.	W	55.	<3,524.>
MERRILL - 6109	VARIOUS	06/30/20	123,372.	140,491.			<17,119.>
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) ▶			477,761.	523,907.		141.	<46,005.>

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on page 1

GREGG K. & REBECCA M. WEISS

Social security number or taxpayer identification no. [redacted]

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

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

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

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

[X] **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

[ ] **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

[ ] **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the instructions	**Adjustment, if any, to gain or loss.** If you enter an amount in column (g), enter a code in column (f). **See instructions.** (f) Code(s)	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) & combine the result with column (g)
MERRILL - 6105	VARIOUS	06/30/20	54,843.	46,095.			8,748.
MERRILL - 6106	VARIOUS	06/30/20	51,065.	31,665.			19,400.
MERRILL - 6107	VARIOUS	06/30/20	47,834.	30,829.	W	56.	17,061.
MERRILL - 6108	VARIOUS	06/30/20	38,116.	34,386.	W	41.	3,771.
MERRILL - 6109	VARIOUS	06/30/20	68,570.	53,092.	W	102.	15,580.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) ▶			260,428.	196,067.		199.	64,560.

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.

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on page 1

GREGG K. & REBECCA M. WEISS

Social security number or taxpayer identification no. [redacted]

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

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

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

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

☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☒ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions. (f) Code(s)	(g) Amount of adjustment	(h) Gain or (loss). Subtract column (e) from column (d) & combine the result with column (g)
MERRILL - 6100	VARIOUS	06/30/20	93,689.	47,670.			46,019.
MERRILL - 6105	VARIOUS	06/30/20	1,473.	1,003.			470.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) ▶			95,162.	48,673.			46,489.

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.

Qualified Dividends and Capital Gain Tax Worksheet - Line 16

Keep for Your Records

Name(s) shown on return	Your SSN
GREGG K. & REBECCA M. WEISS	[redacted]

Before you begin:
- ✓ See the earlier instructions for line 16 to see if you can use this worksheet to figure your tax.
- ✓ Before completing this worksheet, complete Form 1040 or 1040-SR through line 15.
- ✓ If you don't have to file Schedule D and you received capital gain distributions, be sure you checked the box on Form 1040 or 1040-SR, line 7.

1.	Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1. 265,559.	
2.	Enter the amount from Form 1040 or 1040-SR, line 3a*	2. 36,649.	
3.	Are you filing Schedule D?* [X] **Yes.** Enter the **smaller** of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or a loss, enter -0-. [ ] **No.** Enter the amount from Form 1040 or 1040-SR, line 7.	3. 89,057.	
4.	Add lines 2 and 3	4. 125,706.	
5.	Subtract line 4 from line 1. If zero or less, enter -0-	5. 139,853.	
6.	Enter: $ 40,000 if single or married filing separately, $ 80,000 if married filing jointly or qualifying widow(er), $ 53,600 if head of household.	6. 80,000.	
7.	Enter the smaller of line 1 or line 6	7. 80,000.	
8.	Enter the smaller of line 5 or line 7	8. 80,000.	
9.	Subtract line 8 from line 7. This amount is taxed at 0%	9. 0.	
10.	Enter the smaller of line 1 or line 4	10. 125,706.	
11.	Enter the amount from line 9	11. 0.	
12.	Subtract line 11 from line 10	12. 125,706.	
13.	Enter: $ 441,450 if single, $ 248,300 if married filing separately, $ 496,600 if married filing jointly or qualifying widow(er), $ 469,050 if head of household.	13. 496,600.	
14.	Enter the smaller of line 1 or line 13	14. 265,559.	
15.	Add lines 5 and 9	15. 139,853.	
16.	Subtract line 15 from line 14. If zero or less, enter -0-	16. 125,706.	
17.	Enter the smaller of line 12 or line 16	17. 125,706.	
18.	Multiply line 17 by 15% (0.15)		18. 18,856.
19.	Add lines 9 and 17	19. 125,706.	
20.	Subtract line 19 from line 10	20. 0.	
21.	Multiply line 20 by 20% (0.20)		21. 0.
22.	Figure the tax on the amount on line 5. If the amount on line 5 is less than $100,000, use the Tax Table to figure the tax. If the amount on line 5 is $100,000 or more, use the Tax Computation Worksheet		22. 22,348.
23.	Add lines 18, 21, and 22		23. 41,204.
24.	Figure the tax on the amount on line 1. If the amount on line 1 is less than $100,000, use the Tax Table to figure the tax. If the amount on line 1 is $100,000 or more, use the Tax Computation Worksheet		24. 51,893.
25.	**Tax on all taxable income.** Enter the **smaller** of line 23 or 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet		25. 41,204.

** If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.*

SCHEDULE E (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

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

OMB No. 1545-0074

2020

Attachment Sequence No. 13

Name(s) shown on return

GREGG K. & REBECCA M. WEISS

Your social security number [redacted]

Part I **Income or Loss From Rental Real Estate and Royalties** **Note:** If you are in the business of renting personal property, use **Schedule C.** See instructions. If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

A Did you make any payments in 2020 that would require you to file Form(s) 1099? See instructions ☐ Yes ☒ No

B If "Yes," did you or will you file required Form(s) 1099? ☐ Yes ☐ No

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

A 221 35TH STREET UNIT B, NEWPORT BEACH, CA 92663

B 721 KANUGA DRIVE, WEST PALM BEACH, FL 33401

C

1b	Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the **QJV** box only if you meet the requirements to file as a qualified joint venture. See instructions.		Fair Rental Days	Personal Use Days	QJV
A	1		A	365		☐
B	1		B	365		☐
C			C			☐

Type of Property:

1 Single Family Residence 3 Vacation/Short-Term Rental 5 Land 7 Self-Rental

2 Multi-Family Residence 4 Commercial 6 Royalties 8 Other (describe)

Income:	Properties:		A	B	C
3 Rents received		3	93,600.	30,600.	
4 Royalties received		4			
Expenses:					
5 Advertising		5			
6 Auto and travel (see instructions)		6			
7 Cleaning and maintenance		7	1,187.	2,736.	
8 Commissions		8			
9 Insurance		9		4,150.	
10 Legal and other professional fees		10			
11 Management fees		11	1,266.		
12 Mortgage interest paid to banks, etc. (see instructions)		12	24,916.	6,108.	
13 Other interest		13			
14 Repairs		14	1,835.	444.	
15 Supplies		15			
16 Taxes		16	15,235.	17,504.	
17 Utilities		17	581.		
18 Depreciation expense or depletion		18	5,172.	8,310.	
19 Other (list) ▶ STMT 11		19		300.	
20 Total expenses. Add lines 5 through 19		20	50,192.	39,552.	
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file **Form 6198**		21	43,408.	-8,952.	
22 Deductible rental real estate loss after limitation, if any, on **Form 8582** (see instructions)		22	( )	8,952.	( )

23a	Total of all amounts reported on line 3 for all rental properties	23a	124,200.	
b	Total of all amounts reported on line 4 for all royalty properties	23b		
c	Total of all amounts reported on line 12 for all properties	23c	31,024.	
d	Total of all amounts reported on line 18 for all properties	23d	13,482.	
e	Total of all amounts reported on line 20 for all properties	23e	89,744.	
24	**Income.** Add positive amounts shown on line 21. **Do not** include any losses	24		43,408.
25	**Losses.** Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25		(8,952.)
26	**Total rental real estate and royalty income or (loss).** Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2	26		34,456.

LHA **For Paperwork Reduction Act Notice, see the separate instructions.** **Schedule E (Form 1040) 2020**

021491 12-01-20

2020 DEPRECIATION AND AMORTIZATION REPORT

221 35TH STREET UNIT A & B - 221 35TH

SCHEDULE E- 1

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	BUILDING - 428 FERNLEAF (1031 EXCHANGE) UNIT A	01/01/01	SL	27.50	MM	17	45,625.				45,625.	31,454.		1,659.	33,113.
2	LAND - 428 FERNLEAF (1031 EXCHANGE) UNIT A	01/01/01	L				136,875.				136,875.			0.	0.
3	BUILDING ADDL COST OF REPLACEMENT PROPERTY UNIT A	08/21/19	SL	27.50	MM	17	7,500.				7,500.	102.		273.	375.
4	LAND ADDIITONAL COST OF REPLACEMENT PROPERTY UNIT A	08/21/19	L				30,000.				30,000.			0.	0.
5	BUILDING - BOOT RECEIVED UNIT A	08/21/19	SL	27.50	MM	17	17,995.				17,995.	245.		654.	899.
6	LAND - BOOT RECEIVED UNIT A	08/21/19	L				71,983.				71,983.			0.	0.
7	BUILDING - 428 FERNLEAF (1031 EXCHANGE) UNIT B	01/01/01	SL	27.50	MM	17	45,625.				45,625.	31,455.		1,659.	33,114.
8	LAND - 428 FERNLEAF (1031 EXCHANGE) UNIT B	01/01/01	L				136,875.				136,875.			0.	0.
9	BUILDING ADDL COST OF REPLACEMENT PROPERTY UNIT B	08/21/19	SL	27.50	MM	17	7,500.				7,500.	102.		273.	375.
10	LAND ADDIITONAL COST OF REPLACEMENT PROPERTY UNIT B	08/21/19	L				30,000.				30,000.			0.	0.
11	BUILDING - BOOT RECEIVED UNIT B	08/21/19	SL	27.50	MM	17	17,995.				17,995.	245.		654.	899.
12	LAND - BOOT RECEIVED UNIT B	08/21/19	L				71,983.				71,983.			0.	0.
	TOTAL SCH E DEPRECIATION						619,956.				619,956.	63,603.		5,172.	68,775.

028111 04-01-20

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

721 KANUGA DRIVE - 721 KANUGA DRIVE, W SCHEDULE E- 2

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
18	BUILDING - 721 KANUGA DRIVE	03/03/15	SL	27.50	MM	17	228,528.				228,528.	39,815.		8,310.	48,125.
19	LAND - 721 KANUGA DRIVE	03/03/15	L				97,941.				97,941.			0.	0.
	TOTAL SCH E DEPRECIATION						326,469.				326,469.	39,815.		8,310.	48,125.

028111 04-01-20

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

DOES NOT APPLY

Form **6251**

Department of the Treasury
Internal Revenue Service (99)

Alternative Minimum Tax - Individuals

▶ Go to www.irs.gov/Form6251 for instructions and the latest information.
▶ Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2020

Attachment Sequence No. 32

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

GREGG K. & REBECCA M. WEISS

Your social security number

[redacted]

Part I Alternative Minimum Taxable Income

1	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 lines 12 and 13 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.)	1	265,559.
2a	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	2a	10,000.
b	Tax refund from Schedule 1 (Form 1040), line 1 or line 8	2b	
c	Investment interest expense (difference between regular tax and AMT)	2c	
d	Depletion (difference between regular tax and AMT)	2d	
e	Net operating loss deduction from Schedule 1 (Form 1040), line 8. Enter as a positive amount	2e	
f	Alternative tax net operating loss deduction	2f	
g	Interest from specified private activity bonds exempt from the regular tax	2g	
h	Qualified small business stock, see instructions	2h	
i	Exercise of incentive stock options (excess of AMT income over regular tax income)	2i	
j	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	2j	
k	Disposition of property (difference between AMT and regular tax gain or loss)	2k	
l	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	2l	
m	Passive activities (difference between AMT and regular tax income or loss) SEE STATEMENT 12	2m	0.
n	Loss limitations (difference between AMT and regular tax income or loss)	2n	
o	Circulation costs (difference between regular tax and AMT)	2o	
p	Long-term contracts (difference between AMT and regular tax income)	2p	
q	Mining costs (difference between regular tax and AMT)	2q	
r	Research and experimental costs (difference between regular tax and AMT)	2r	
s	Income from certain installment sales before January 1, 1987	2s	
t	Intangible drilling costs preference	2t	
3	Other adjustments, including income-based related adjustments	3	
4	**Alternative minimum taxable income.** Combine lines 1 through 3. (If married filing separately and line 4 is more than $745,200, see instructions.)	4	275,559.

Part II Alternative Minimum Tax (AMT)

5 Exemption.

IF your filing status is ...	AND line 4 is not over ...	THEN enter on line 5 ...
Single or head of household	$518,400	$72,900
Married filing jointly or qualifying widow(er)	1,036,800	113,400
Married filing separately	518,400	56,700

If line 4 is **over** the amount shown above for your filing status, see instructions. → 5 **113,400.**

6	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	6	162,159.
7	• If you are filing Form 2555, see instructions for the amount to enter. • 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. • **All others:** If line 6 is $197,900 or less ($98,950 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract $3,958 ($1,979 if married filing separately) from the result	7	28,334.
8	Alternative minimum tax foreign tax credit (see instructions)	8	
9	Tentative minimum tax. Subtract line 8 from line 7	9	28,334.
10	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 any foreign tax credit from Schedule 3 (Form 1040), line 1. 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)	10	41,204.
11	**AMT.** Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1	11	0.

Part III Tax Computation Using Maximum Capital Gains Rates

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

12	Enter the amount from Form 6251, line 6. If you are filing Form 2555, enter the amount from line 3 of the worksheet in the instructions for line 7	162,159.
13	Enter the amount from line 4 of the Qualified Dividends and Capital Gain Tax Worksheet in the Instructions for Forms 1040 and 1040-SR or the amount from line 13 of the Schedule D Tax Worksheet in the Instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555, see instructions for the amount to enter	125,706.
14	Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555, see instructions for the amount to enter	
15	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 13. Otherwise, add lines 13 and 14, and enter the **smaller** of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555, see instructions for the amount to enter	125,706.
16	Enter the **smaller** of line 12 or line 15	125,706.
17	Subtract line 16 from line 12	36,453.
18	If line 17 is $197,900 or less ($98,950 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract $3,958 ($1,979 if married filing separately) from the result ▶	9,478.
19	Enter: • $80,000 if married filing jointly or qualifying widow(er), • $40,000 if single or married filing separately, or • $53,600 if head of household.	80,000.
20	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 14 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	139,853.
21	Subtract line 20 from line 19. If zero or less, enter -0-	0.
22	Enter the **smaller** of line 12 or line 13	125,706.
23	Enter the **smaller** of line 21 or line 22. This amount is taxed at 0%	0.
24	Subtract line 23 from line 22	125,706.
25	Enter: • $441,450 if single • $248,300 if married filing separately • $496,600 if married filing jointly or qualifying widow(er) • $469,050 if head of household	496,600.
26	Enter the amount from line 21	0.
27	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 21 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	139,853.
28	Add line 26 and line 27	139,853.
29	Subtract line 28 from line 25. If zero or less, enter -0-	356,747.
30	Enter the smaller of line 24 or line 29	125,706.
31	Multiply line 30 by 15% (0.15) ▶	18,856.
32	Add lines 23 and 30	125,706.
	If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33.	
33	Subtract line 32 from line 22	0.
34	Multiply line 33 by 20% (0.20) ▶	
	If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35.	
35	Add lines 17, 32, and 33	
36	Subtract line 35 from line 12	
37	Multiply line 36 by 25% (0.25) ▶	
38	Add lines 18, 31, 34, and 37	28,334.
39	If line 12 is $197,900 or less ($98,950 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract $3,958 ($1,979 if married filing separately) from the result	42,161.
40	Enter the **smaller** of line 38 or line 39 here and on line 7. If you are filing Form 2555, do not enter this amount on line 7. Instead, enter it on line 4 of the worksheet in the instructions for line 7	28,334.

ALTERNATIVE MINIMUM TAX RECONCILIATION REPORT

Name(s)

GREGG K. & REBECCA M. WEISS

Social Security Number [redacted]

Form Name	Description	Income	Adjustment				
			Form 6251, Line 2k	Form 6251, Line 2l	Form 6251, Line 2m	Form 6251, Line 2n	Form 6251 Other Adjustment
E-	221 35TH STREET UNIT A & B - 221 35TH STREET						
	* REGULAR INCOME	43,408.					
	* AMT NET INCOME	43,408.					
E-	721 KANUGA DRIVE - 721 KANUGA DRIVE, WEST PA						
	* REGULAR INCOME	-8,952.					
	* AMT NET INCOME	-8,952.					

ALTERNATIVE MINIMUM TAX DEPRECIATION REPORT

Asset No.	Description	Date Acquired	AMT Method	AMT Life	AMT Cost Or Basis	AMT Accumulated	Regular Depreciation	AMT Depreciation	AMT Adjustment
	221 35TH STREET UNIT A & B - 221 35TH STREET U								
1	BUILDING - 428 FERNLEAF (1031 EXCHANGE) UNIT A	01 01 01	SL	27.50	45,625.	0.	1,659.	1,659.	0.
3	BUILDING ADDL COST OF REPLACEMENT PROPERTY UNI	08 21 19	SL	27.50	7,500.	102.	273.	273.	0.
5	BUILDING - BOOT RECEIVED UNIT A	08 21 19	SL	27.50	17,995.	245.	654.	654.	0.
7	BUILDING - 428 FERNLEAF (1031 EXCHANGE) UNIT B	01 01 01	SL	27.50	45,625.	0.	1,659.	1,659.	0.
9	BUILDING ADDL COST OF REPLACEMENT PROPERTY UNI	08 21 19	SL	27.50	7,500.	102.	273.	273.	0.
11	BUILDING - BOOT RECEIVED UNIT B	08 21 19	SL	27.50	17,995.	245.	654.	654.	0.
	** SUBTOTAL **				142,240.	694.	5,172.	5,172.	0.
	721 KANUGA DRIVE - 721 KANUGA DRIVE, WEST PALM								
18	BUILDING - 721 KANUGA DRIVE	03 03 15	SL	27.50	228,528.	39,819.	8,310.	8,310.	0.
	** SUBTOTAL **				228,528.	39,819.	8,310.	8,310.	0.
	*** GRAND TOTAL ***				370,768.	40,513.	13,482.	13,482.	0.

Form **8995**

Department of the Treasury
Internal Revenue Service

Qualified Business Income Deduction Simplified Computation

▶ Attach to your tax return.
▶ Go to www.irs.gov/Form8995 for instructions and the latest information.

OMB No. 1545-2294

2020

Attachment Sequence No. **55**

Name(s) shown on return

GREGG K. & REBECCA M. WEISS

Your taxpayer identification number

[redacted]

Note. *You can claim the qualified business income deduction* **only** *if you have qualified business income from a qualified trade or business, real estate investment trust dividends, publicly traded partnership income, or a domestic production activities deduction passed through from an agricultural or horticultural cooperative. See instructions.*
Use this form if your taxable income, before your qualified business income deduction, is at or below $163,300 ($326,600 if married filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i			
ii			
iii			
iv			
v			

2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)	2			
3	Qualified business net (loss) carryforward from the prior year	3	( )		
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-	4			
5	Qualified business income component. Multiply line 4 by 20% (0.20)			5	
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions) SEE STATEMENT 13	6	579.		
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7	( )		
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0-	8	579.		
9	REIT and PTP component. Multiply line 8 by 20% (0.20)			9	116.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9			10	116.
11	Taxable income before qualified business income deduction	11	265,675.		
12	Net capital gain (see instructions)	12	125,706.		
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	139,969.		
14	Income limitation. Multiply line 13 by 20% (0.20)			14	27,994.
15	Qualified business income deduction. Enter the lesser of line 10 or line 14. Also enter this amount on the applicable line of your return ▶			15	116.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-			16	( )
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-			17	( )

Form **8960**

Department of the Treasury
Internal Revenue Service (99)

Net Investment Income Tax - Individuals, Estates, and Trusts

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form8960 for instructions and the latest information.

OMB No. 1545-2227

2020

Attachment Sequence No. 72

Name(s) shown on your tax return

GREGG K. & REBECCA M. WEISS

Your social security number or EIN [redacted]

Part I Investment Income

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

1	Taxable interest (see instructions)			1	566.
2	Ordinary dividends (see instructions)			2	46,672.
3	Annuities (see instructions)			3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a	34,456.		
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b			
c	Combine lines 4a and 4b			4c	34,456.
5a	Net gain or loss from disposition of property (see instructions)	5a	89,057.		
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b			
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c			
d	Combine lines 5a through 5c			5d	89,057.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)			6	
7	Other modifications to investment income (see instructions)			7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7			8	170,751.

Part II Investment Expenses Allocable to Investment Income and Modifications

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

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13-17. Estates and trusts, complete lines 18a-21. If zero or less, enter -0-			12	170,751.
	Individuals:				
13	Modified adjusted gross income (see instructions)	13	299,987.		
14	Threshold based on filing status (see instructions)	14	250,000.		
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	49,987.		
16	Enter the smaller of line 12 or line 15			16	49,987.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). **Enter here and include on your tax return** (see instructions)			17	1,900.
	Estates and Trusts:				
18a	Net investment income (line 12 above)	18a			
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b			
c	Undistributed net investment income. Subtract line 18b from 18a (see instructions). If zero or less, enter -0-	18c			
19a	Adjusted gross income (see instructions)	19a			
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b			
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c			
20	Enter the smaller of line 18c or line 19c			20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). **Enter here and include on your tax return** (see instructions)			21	

LHA **For Paperwork Reduction Act Notice, see your tax return instructions.** Form **8960** (2020)

023121 01-26-21

Form **8582**

Department of the Treasury
Internal Revenue Service (99)

Passive Activity Loss Limitations

▶ See separate instructions.
▶ Attach to Form 1040, 1040-SR, or 1041.
▶ Go to www.irs.gov/Form8582 for instructions and the latest information.

OMB No. 1545-1008

2020

Attachment Sequence No. **858**

Name(s) shown on return

GREGG K. & REBECCA M. WEISS

Identifying number [redacted]

Part I 2020 Passive Activity Loss

Caution: Complete Worksheets 1, 2, and 3 before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation, see **Special Allowance for Rental Real Estate Activities** in the instructions.)

1a	Activities with net income (enter the amount from Worksheet 1, column (a))	1a	43,408.	
b	Activities with net loss (enter the amount from Worksheet 1, column (b))	1b	(8,952.)	
c	Prior years' unallowed losses (enter the amount from Worksheet 1, column (c))	1c	( )	
d	Combine lines 1a, 1b, and 1c			1d 34,456.

Commercial Revitalization Deductions From Rental Real Estate Activities

2a	Commercial revitalization deductions from Worksheet 2, column (a)	2a	( )	
b	Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)	2b	( )	
c	Add lines 2a and 2b			2c ( )

All Other Passive Activities

3a	Activities with net income (enter the amount from Worksheet 3, column (a))	3a		
b	Activities with net loss (enter the amount from Worksheet 3, column (b))	3b	( )	
c	Prior years' unallowed losses (enter the amount from Worksheet 3, column (c))	3c	( )	
d	Combine lines 3a, 3b, and 3c			3d

4 Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used ... 4 34,456.

If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
- Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
- Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, **do not** complete Part II or Part III. Instead, go to line 15.

Part II Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

5	Enter the **smaller** of the loss on line 1d or the loss on line 4			5
6	Enter $150,000. If married filing separately, see instructions	6		
7	Enter modified adjusted gross income, but not less than zero. See instructions	7		
	Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.			
8	Subtract line 7 from line 6	8		
9	Multiply line 8 by 50% (0.50). **Do not** enter more than $25,000. If married filing separately, see instructions			9
10	Enter the **smaller** of line 5 or line 9			10

If line 2c is a loss, go to Part III. Otherwise, go to line 15.

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions.

11	Enter $25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions		11
12	Enter the loss from line 4		12
13	Reduce line 12 by the amount on line 10		13
14	Enter the **smallest** of line 2c (treated as a positive amount), line 11, or line 13		14

Part IV Total Losses Allowed

15	Add the income, if any, on lines 1a and 3a and enter the total		15
16	**Total losses allowed from all passive activities for 2020.** Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return		16

Caution: The worksheets must be filed with your tax return. Keep a copy for your records.

Worksheet 1 - For Form 8582, Lines 1a, 1b, and 1c (see instructions)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
	SEE ATTACHED STATEMENT FOR WORKSHEET 1				
Total. Enter on Form 8582, lines 1a, 1b, and 1c ▶	43,408.	-8,952.			

Worksheet 2 - For Form 8582, Lines 2a and 2b (see instructions)

Name of activity	(a) Current year deductions (line 2a)	(b) Prior year unallowed deductions (line 2b)	(c) Overall loss
Total. Enter on Form 8582, lines 2a and 2b ▶			

Worksheet 3 - For Form 8582, Lines 3a, 3b, and 3c (see instructions)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 3a, 3b, and 3c ▶					

Worksheet 4 - Use This Worksheet if an Amount is Shown on Form 8582, Line 10 or 14. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total ▶					

Worksheet 5 - Allocation of Unallowed Losses (see instructions)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Total ▶				

Election to Combine Rental Real Estate Interests Into One Activity Pursuant to IRC Sec. 469(c)(7)(A)

Gregg K. & Rebecca M. Weiss
615 Kanuga Drive
West Palm Beach, FL 33401

Taxpayer Identification Number: [redacted]

For the Year Ending December 31, 2020

Gregg K. & Rebecca M. Weiss hereby elect, pursuant to IRC Sec. 469(c)(7)(A), to combine all rental real estate interests into one activity. For the tax year ending December 31, 2020, Gregg K. & Rebecca M. Weiss were a qualifying taxpayer as defined by IRC Sec. 469(c)(7)(B).

Section 1.263(a)-1(f) De Minimis Safe Harbor Election

Gregg K. & Rebecca M. Weiss
615 Kanuga Drive
West Palm Beach, FL 33401

Taxpayer Identification Number: [redacted]

For the Year Ending December 31, 2020

Gregg K. & Rebecca M. Weiss are making the de minimis safe harbor election under Reg. Sec. 1.263(a)-1(f).

[redacted]

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 1

T S	EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
S	STEPHEN L BROWN	32,596.	1,729.			2,021.	473.
T	BOARD OF COUNTY COMMISSIONERS	96,640.	14,456.			6,182.	1,446.
	TOTALS	129,236.	16,185.			8,203.	1,919.

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 2

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
MERRILL - [redacted]	21,028.	11,378.
MERRILL - [redacted]	4,163.	4,163.
MERRILL - [redacted]	1,574.	1,574.
MERRILL - [redacted]	1,609.	1,556.
MERRILL - [redacted]	2,330.	2,248.
MERRILL - [redacted]	8,864.	8,626.
MORGAN STANLEY	7,104.	7,104.
TOTAL INCLUDED IN FORM 1040, LINE 3A		36,649.

FORM 1040 TAX STATEMENT 3

DESCRIPTION	AMOUNT
FROM QUALIFIED DIVIDENDS AND CAPITAL GAIN WORKSHEET	41,204.
TOTAL TO FORM 1040, LINE 16	41,204.

FORM 1040 FEDERAL INCOME TAX WITHHELD - FORM(S) W-2 STATEMENT 4

T S	DESCRIPTION	AMOUNT
S	STEPHEN L BROWN	1,729.
T	BOARD OF COUNTY COMMISSIONERS	14,456.
	TOTAL TO FORM 1040, LINE 25A	16,185.

[redacted]

SCHEDULE A — CASH CONTRIBUTIONS — STATEMENT 5

DESCRIPTION	AMOUNT 100% LIMIT	AMOUNT 60% LIMIT	AMOUNT 30% LIMIT
PALM BEACH DRAMA WORKS		100.	
TEMPLE ISRAEL		1,098.	
MISCELLANEOUS		6,809.	
SUBTOTALS		8,007.	
TOTAL TO SCHEDULE A, LINE 11			8,007.

SCHEDULE A — MEDICAL AND DENTAL EXPENSES — STATEMENT 6

DESCRIPTION	AMOUNT
DOCTORS, DENTISTS, ETC.	2,724.
TOTAL TO SCHEDULE A, LINE 1	2,724.

SCHEDULE A — REAL ESTATE TAXES — STATEMENT 7

DESCRIPTION	AMOUNT
REAL ESTATE TAXES - JOINT	7,569.
REAL ESTATE TAXES - JOINT	7,611.
TOTAL TO SCHEDULE A, LINE 5B	15,180.

SCHEDULE A — STATE AND LOCAL GENERAL SALES TAXES — STATEMENT 8

DESCRIPTION	AMOUNT
STATE SALES TAX	1,580.
LOCAL SALES TAX	264.
TOTAL TO SCHEDULE A, LINE 5A	1,844.

[redacted]

SCHEDULE A	GENERAL SALES TAX DEDUCTION WORKSHEET	STATEMENT 9

1	ENTER YOUR STATE GENERAL SALES TAXES FROM THE APPLICABLE TABLE. FLORIDA IF, FOR ALL OF 2020, YOU LIVED ONLY IN CONNECTICUT, THE DISTRICT OF COLUMBIA, INDIANA, KENTUCKY, MAINE, MARYLAND, MASSACHUSETTS, MICHIGAN, NEW JERSEY, OR RHODE ISLAND, SKIP LINES 2 THROUGH 5, ENTER -0- ON LINE 6, AND GO TO LINE 7. OTHERWISE, GO TO LINE 2.		1,580.
2	DID YOU LIVE IN ALASKA, ARIZONA, ARKANSAS, COLORADO, GEORGIA, ILLINOIS, LOUISIANA, MISSISSIPPI, MISSOURI, NEW YORK, NORTH CAROLINA, SOUTH CAROLINA, TENNESSEE, UTAH, OR VIRGINIA IN 2020? IF NO, ENTER -0-. IF YES, ENTER YOUR LOCAL GENERAL SALES TAXES FROM THE APPLICABLE TABLE.	0.	
3	DID YOUR LOCALITY IMPOSE A LOCAL GENERAL SALES TAX IN 2020? RESIDENTS OF CALIFORNIA AND NEVADA SEE INSTRUCTIONS. IF NO, SKIP LINES 3 THROUGH 5, ENTER -0- ON LINE 6 AND GO TO LINE 7. IF YES, ENTER YOUR LOCAL GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN. WEST PALM BEACH	1.0000	
4	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, SKIP LINES 4 AND 5 AND GO TO LINE 6. IF YES, ENTER YOUR STATE GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	6.0000	
5	DIVIDE LINE 3 BY LINE 4. ENTER THE RESULT AS A DECIMAL (ROUNDED TO AT LEAST THREE PLACES).	.1670	
6	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, MULTIPLY LINE 2 BY LINE 3. IF YES, MULTIPLY LINE 1 BY LINE 5.		264.
6A	ADD LINE 1 AND LINE 6.		1,844.
6B	PART-YEAR DAYS RATE.		1.000000
6C	MULTIPLY LINE 6A BY LINE 6B.		1,844.
7	ENTER YOUR GENERAL SALES TAXES PAID ON SPECIFIED ITEMS, IF ANY.		
8	DEDUCTION FOR GENERAL SALES TAXES. ADD LINES 6C AND 7. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 5A AND CHECK BOX.		1,844.

[redacted]

SCHEDULE D — CAPITAL GAIN DISTRIBUTIONS — STATEMENT 10

NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
MERRILL - [redacted]	24,013.	
TOTALS TO SCHEDULE D, LINE 13	24,013.	

SCHEDULE E — OTHER EXPENSES — STATEMENT 11

721 KANUGA DRIVE - 721 KANUGA DRIVE, WEST PALM BEACH, FL 33401

DESCRIPTION	AMOUNT
ALARM	300.
TOTAL TO SCHEDULE E, PAGE 1, LINE 19	300.

FORM 6251 — PASSIVE ACTIVITIES — STATEMENT 12

NAME OF ACTIVITY	FORM	NET INCOME (LOSS) AMT	NET INCOME (LOSS) REGULAR	ADJUSTMENT
221 35TH STREET UNIT A & B - 221 35TH STREET UNIT B, NEWPORT BEACH, CA 9266	SCH E	43,408.	43,408.	
721 KANUGA DRIVE - 721 KANUGA DRIVE, WEST PALM BEACH, FL 33401	SCH E	-8,952.	-8,952.	
TOTAL TO FORM 6251, LINE 2M				

[redacted]

FORM 8995 QUALIFIED REIT DIVIDENDS AND PTP INCOME STATEMENT 13

NAME OF ENTITY/ACTIVITY	REIT DIVIDENDS	PTP INCOME
MERRILL - [redacted]	205.	
MERRILL -	53.	
MERRILL -	83.	
MERRILL -	238.	
TOTAL TO FORM 8995, LINE 6	579.	

FORM 8582 ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1 STATEMENT 14

NAME OF ACTIVITY	CURRENT YEAR NET INCOME	CURRENT YEAR NET LOSS	PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS GAIN	OVERALL GAIN OR LOSS LOSS
221 35TH STREET UNIT A & B - 221 35TH STREET UNIT B, NEWPORT BEA	43,408.	0.		43,408.	
721 KANUGA DRIVE - 721 KANUGA DRIVE, WEST PALM BEACH, FL 33401	0.	-8,952.			-8,952.
TOTALS	43,408.	-8,952.		43,408.	-8,952.

[redacted]

FORM 8582 SUMMARY OF PASSIVE ACTIVITIES STATEMENT 15

R R E A -	NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
X	221 35TH STREET UNIT A & B - 221 35TH STREET UNIT B, NEWPORT BEA	SCH E	43,408.		43,408.		
X	721 KANUGA DRIVE - 721 KANUGA DRIVE, WEST PALM BEACH, FL 33401	SCH E	-8,952.		-8,952.		8,952.
TOTALS			34,456.		34,456.		8,952.
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME							
TOTAL							8,952.