CONFIDENTIAL

FORM 6 FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTERESTS 2021

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

FOR OFFICE USE ONLY:

PROCESSED
FLORIDA
COMMISSION ON ETHICS
JUN 16 2022
RECEIVED
38116

LAST NAME — FIRST NAME — MIDDLE NAME:
Johnson Ben Frank

MAILING ADDRESS:
P.O. Box 220169

CITY: Glenwood ZIP: 32722 COUNTY: Volusia

NAME OF AGENCY:
County of Volusia

NAME OF OFFICE OR POSITION HELD OR SOUGHT:
Volusia County Council At Large

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, 2021 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 21 was $ 2,801,474.30.

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 $ 150,000.00

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
Residence - Protected	$450,000
Rental: 2805 Grand Ave., Deland, Fl 32720	$200,000
See attachment:	

PART C -- LIABILITIES

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

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
None	

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY

(Continued on reverse side)

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 2021 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 2021 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 Florida

Sworn to (or affirmed) and subscribed before me by means of ☑ physical presence or ☐ online notarization, this 13th day of June, 2022 by Ben F Johnson.

Deanna E Sutton
(Signature of Notary Public--State of Florida)

DEANNA E. SUTTON
(Print, Type, or Stamp Commissioned Name of Notary Public)
Commission # GG 313300
Expires March 18, 2023
Bonded Thru Budget Notary Services

Personally Known _____ OR Produced Identification

Type of Identification Produced FL Dr Lic J550066500-0

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 ☐

Ben F. Johnson

P.O. Box 220169

Glenwood, Florida 32722

Form 6 Full and Public Disclosure Of Financial Interest 2021

2020 GMC Yukon Denali	$70,000
2019 Chevrolet Colorado	30,000
2002 GMC Sonoma	6,500
2014 Jayco Travel Trailer	13,500
2014 Airboat	40,000
2020 Utility Trailer	1,800
2017 Toyota Camry	13,000
2020 Polaris Ranger	20,000

Stocks, Bonds and Holdings:

Ohio National	$176,273
Ohio National	58,359
Fidelity Investments	692,452
Fidelity Investments IRA	609,877
Surety Bank Stock	31,790

Bank Accounts:

Mainstreet Savings	183,075.52
Mainstreet Checking	16,272.06
Mainstreet Farmton Account	38,575.80

Notary Deanna E Sutton

NOTARY PUBLIC STATE OF FLORIDA

DEANNA E. SUTTON
Commission # GG 313360
Expires March 18, 2023
Bonded Thru Budget Notary Services

Form **1040** Department of the Treasury—Internal Revenue Service (99) **U.S. Individual Income Tax Return** **2021** OMB No. 1545-0074 IRS Use Only–Do not write or staple in this space.

Filing Status Check only one box. ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)
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
Ben F.	Johnson	[redacted]
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
[redacted]	Johnson	[redacted]

Home address (number and street). If you have a P.O box, see instructions. PO Box 220169 — Apt. no.

City, town or post office. If you have a foreign address, also complete spaces below. Glenwood — State FL — ZIP code 32722-0169

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 2021, did you receive, sell, exchange, or otherwise dispose of 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, 1957 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1957 ☐ 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.

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1	Wages, salaries, tips, etc. Attach Form(s) W-2				1	166,561
2a	Tax-exempt interest	2a		b Taxable interest	2b	113
3a	Qualified dividends	3a	7,012	b Ordinary dividends	3b	13,649
4a	IRA distributions	4a		b Taxable amount	4b	
5a	Pensions and annuities	5a	154,771	b Taxable amount	5b	154,685
6a	Soc. sec. ben.	6a	32,784	b Taxable amount	6b	27,866
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐				7	9,714
8	Other income from Schedule 1, line 10				8	26,454
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** ▶				9	399,042
10	Adjustments to income from Schedule 1, line 26				10	1,869
11	Subtract line 10 from line 9. This is your **adjusted gross income** ▶				11	397,173
12a	**Standard deduction or itemized deductions** (from Schedule A)			12a	26,450	
b	Charitable contributions if you take the standard deduction (see instructions)			12b	600	
c	Add lines 12a and 12b				12c	27,050
13	Qualified business income deduction from Form 8995 or Form 8995-A				13	4,585
14	Add lines 12c and 13 ▶				14	31,635
15	**Taxable income.** Subtract line 14 from line 11. If zero or less, enter -0-				15	365,538

Standard Deduction for –
- Single or Married filing separately, $12,550
- Married filing jointly or Qualifying widow(er), $25,100
- Head of household, $18,800
- If you checked any box under *Standard Deduction*, see instructions.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Form **1040** (2021)

DAA

Form 1040 (2021) **Ben F. & [redacted] Johnson** [redacted] Page 2

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐		16	75,444
17	Amount from Schedule 2, line 3		17	
18	Add lines 16 and 17		18	75,444
19	Nonrefundable child tax credit or credit for other dependents from Schedule 8812		19	
20	Amount from Schedule 3, line 8		20	50
21	Add lines 19 and 20		21	50
22	Subtract line 21 from line 18. If zero or less, enter -0-		22	75,394
23	Other taxes, including self-employment tax, from Schedule 2, line 21		23	4,629
24	Add lines 22 and 23. This is your **total tax** ▶		24	80,023
25	Federal income tax withheld from:			
a	Form(s) W-2	25a 48,246		
b	Form(s) 1099	25b 39,419		
c	Other forms (see instructions)	25c		
d	Add lines 25a through 25c		25d	87,665
26	2021 estimated tax payments and amount applied from 2020 return		26	
27a	Earned income credit (EIC)	27a		
	Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all other requirements for taxpayers who are at least age 18, to claim the EIC. See instructions ▶ ☐			
b	Nontaxable combat pay election	27b		
c	Prior year (2019) earned income	27c		
28	Refundable child tax credit or additional child tax credit from Sch. 8812	28		
29	American opportunity credit from Form 8863, line 8	29		
30	Recovery rebate credit. See instructions	30 0		
31	Amount from Schedule 3, line 15	31		
32	Add lines 27a and 28 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	87,665

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

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid		34	7,642
35a	Amount of line 34 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐		35a	7,642
b	Routing number [redacted] ▶ c Type: ☐ Checking ☒ Savings			
d	Account number [redacted]			
36	Amount of line 34 you want **applied to your 2022 estimated tax** ▶	36		

Direct deposit? See instructions.

Amount You Owe

37	**Amount you owe.** Subtract line 33 from line 24. For details on how to pay, see instructions ▶		37	
38	Estimated tax penalty (see instructions) ▶	38		

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 ▶ **Ronald J Cantlay** Phone no. ▶ **386-734-9441** Personal identification number (PIN) ▶ [redacted]

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.

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see instr.) ▶
		Retired	
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 instr.) ▶
		[redacted]	

Phone no. Email address

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if:
Ronald J Cantlay	Ronald J Cantlay	03/18/22	[redacted]	☐ Self-employed

Firm's name ▶ **Dreggors, Rigsby & Teal, P.A.** Phone no. **386-734-9441**

Firm's address ▶ **1006 N Woodland Blvd Deland FL 32720-2769** Firm's EIN ▶ **59-3623200**

Go to *www.irs.gov/Form1040* for instructions and the latest information. Form **1040** (2021)

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DAA

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

2021

Attachment Sequence No. 01

Name(s) shown on Form 1040, 1040-SR, or 1040-NR
Ben F. & [redacted] Johnson

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	26,454
4	Other gains or (losses). Attach Form 4797			4	-3
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E			5	3
6	Farm income or (loss). Attach Schedule F			6	
7	Unemployment compensation			7	
8	Other income:				
a	Net operating loss	8a	( )		
b	Gambling income	8b			
c	Cancellation of debt	8c			
d	Foreign earned income exclusion from Form 2555	8d	( )		
e	Taxable Health Savings Account distribution	8e			
f	Alaska Permanent Fund dividends	8f			
g	Jury duty pay	8g			
h	Prizes and awards	8h			
i	Activity not engaged in for profit income	8i			
j	Stock options	8j			
k	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8k			
l	Olympic and Paralympic medals and USOC prize money (see instructions)	8l			
m	Section 951(a) inclusion (see instructions)	8m			
n	Section 951A(a) inclusion (see instructions)	8n			
o	Section 461(l) excess business loss adjustment	8o			
p	Taxable distributions from an ABLE account (see instructions)	8p			
z	Other income. List type and amount ▶	8z			
9	Total other income. Add lines 8a through 8z			9	
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8			10	26,454

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Part II Adjustments to Income

11	Educator expenses			11	
12	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106			12	
13	Health savings account deduction. Attach Form 8889			13	[redacted]
14	Moving expenses for members of the Armed Forces. Attach Form 3903			14	
15	Deductible part of self-employment tax. Attach Schedule SE			15	1,869
16	Self-employed SEP, SIMPLE, and qualified plans			16	
17	Self-employed health insurance deduction			17	
18	Penalty on early withdrawal of savings			18	
19a	Alimony paid			19a	
b	Recipient's SSN ▶				
c	Date of original divorce or separation agreement (see instructions) ▶				
20	IRA deduction			20	
21	Student loan interest deduction			21	
22	Reserved for future use			22	
23	Archer MSA deduction			23	
24	Other adjustments:				
a	Jury duty pay (see instructions)	24a			
b	Deductible expenses related to income reported on line 8k from the rental of personal property engaged in for profit	24b			
c	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8l	24c			
d	Reforestation amortization and expenses	24d			
e	Repayment of supplemental unemployment benefits under the Trade Act of 1974	24e			
f	Contributions to section 501(c)(18)(D) pension plans	24f			
g	Contributions by certain chaplains to section 403(b) plans	24g			
h	Attorney fees and court costs you paid in connection with an unlawful discrimination claims (see instructions)	24h			
i	Attorney fees and court costs you paid in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations	24i			
j	Housing deduction from Form 2555	24j			
k	Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041)	24k			
z	Other adjustments. List type and amount ▶	24z			
25	Total other adjustments. Add lines 24a through 24z			25	
26	Add lines 11 through 23 and 25. These are your **adjustments to income.** Enter here and on Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a			26	1,869

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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

2021

Attachment Sequence No. **02**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR
Ben F. & [redacted] Johnson

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	

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE			4	3,737
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5			
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6			
7	Total additional social security and Medicare tax. Add lines 5 and 6			7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required			8	
9	Household employment taxes. Attach Schedule H			9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required			10	
11	Additional Medicare Tax. Attach Form 8959			11	
12	Net investment income tax. Attach Form 8960			12	892
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12			13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares			14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over $150,000			15	
16	Recapture of low-income housing credit. Attach Form 8611			16	

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(continued on page 2)

Part II Other Taxes *(continued)*

17	Other additional taxes:			
a	Recapture of other credits. List type, form number, and amount ▶ _____	17a		
b	Recapture of federal mortgage subsidy. If you sold your home in 2021, see instructions	17b		
c	Additional tax on HSA distributions. Attach Form 8889	17c		
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17d		
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e		
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f		
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g		
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h		
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i		
j	Section 72(m)(5) excess benefits tax	17j		
k	Golden parachute payments	17k		
l	Tax on accumulation distribution of trusts	17l		
m	Excise tax on insider stock compensation from an expatriated corporation	17m		
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n		
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o		
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of section 1291 funds	17p		
q	Any interest from Form 8621, line 24	17q		
z	Any other taxes. List type and amount ▶ _____	17z		
18	Total additional taxes. Add lines 17a through 17z		18	
19	Additional tax from Schedule 8812		19	
20	Section 965 net tax liability installment from Form 965-A	20		
21	Add lines 4, 7 through 16, 18, and 19. These are your **total other taxes.** Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		21	4,629

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SCHEDULE 3
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Credits and Payments

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

OMB No. 1545-0074
2021
Attachment Sequence No. **03**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR
Ben F. & [redacted] Johnson

Your social security number
[redacted]

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required		1	50
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441		2	
3	Education credits from Form 8863, line 19		3	
4	Retirement savings contributions credit. Attach Form 8880		4	
5	Residential energy credits. Attach Form 5695		5	
6	Other nonrefundable credits:			
a	General business credit. Attach Form 3800	6a		
b	Credit for prior year minimum tax. Attach Form 8801	6b		
c	Adoption credit. Attach Form 8839	6c		
d	Credit for the elderly or disabled. Attach Schedule R	6d		
e	Alternative motor vehicle credit. Attach Form 8910	6e		
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f		
g	Mortgage interest credit. Attach Form 8396	6g		
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h		
i	Qualified electric vehicle credit. Attach Form 8834	6i		
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j		
k	Credit to holders of tax credit bonds. Attach Form 8912	6k		
l	Amount on Form 8978, line 14. See instructions	6l		
z	Other nonrefundable credits. List type and amount ▶	6z		
7	Total other nonrefundable credits. Add lines 6a through 6z		7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR line 20		8	50

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(continued on page 2)

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

2021

Attachment Sequence No. **08**

Name(s) shown on return

Ben F. & [redacted] Johnson

Your social security number

[redacted]

Part I Interest

(See instructions and the instructions for Form 1040 and 1040-SR, line 2b.)

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.

			Amount
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 ▶		
	Mainstreet Community Bank		112
	National Financial Services LLC - Acct 7025		1
		1	
2	Add the amounts on line 1	2	113
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	113

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

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Part II Ordinary Dividends

(See instructions and the instructions for Form 1040 and 1040-SR, line 3b.)

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.

			Amount
5	List name of payer ▶		
	National Financial Services LLC - Acc[redacted]		13,643
	Surety Bank		6
		5	
6	Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b ▶	6	13,649

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.

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.

		Yes	No
7a	At any time during 2021, 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 2021 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 C (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Profit or Loss From Business

(Sole Proprietorship)

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

▶ Attach to Form 1040, 1040-SR, 1040-NR, or 1041; partnerships generally must file Form 1065.

OMB No. 1545-0074

2021

Attachment Sequence No. 09

Name of proprietor: **Ben F. Johnson**

Social security number (SSN): [redacted]

A Principal business or profession, including product or service (see instructions): **Hunt Club**

B Enter code from instructions ▶ [redacted]

C Business name. If no separate business name, leave blank.: **Farmton Hunt Club**

D Employer ID number (EIN) (see instr.)

E Business address (including suite or room no.) ▶ **PO Box 220169**

City, town or post office, state, and ZIP code: **Glenwood FL 32722-0169**

F Accounting method: (1) [X] Cash (2) [ ] Accrual (3) [ ] Other (specify) ▶

G Did you "materially participate" in the operation of this business during 2021? If "No," see instructions for limit on losses [X] Yes [ ] No

H If you started or acquired this business during 2021, check here ▶ [ ]

I Did you make any payments in 2021 that would require you to file Form(s) 1099? See instructions [X] Yes [ ] No

J If "Yes," did you or will you file required Form(s) 1099? [X] Yes [ ] No

Part I Income

1	Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked ▶ [ ]	1	402,105
2	Returns and allowances	2	
3	Subtract line 2 from line 1	3	402,105
4	Cost of goods sold (from line 42)	4	
5	**Gross profit.** Subtract line 4 from line 3	5	402,105
6	Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)	6	
7	**Gross income.** Add lines 5 and 6 ▶	7	402,105

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

8	Advertising	8	779	18	Office expense (see instructions)	18	1,932
9	Car and truck expenses (see instructions)	9	16,001	19	Pension and profit-sharing plans	19	
10	Commissions and fees	10		20	Rent or lease (see instructions):		
11	Contract labor (see instructions)	11		a	Vehicles, machinery, and equipment	20a	
12	Depletion	12		b	Other business property	20b	324,472
13	Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	13	160	21	Repairs and maintenance	21	3,783
14	Employee benefit programs (other than on line 19)	14		22	Supplies (not included in Part III)	22	4,729
15	Insurance (other than health)	15	12,062	23	Taxes and licenses	23	244
16	Interest (see instructions):			24	Travel and meals:		
a	Mortgage (paid to banks, etc.)	16a		a	Travel	24a	2,500
b	Other	16b		b	Deductible meals (see instructions)	24b	869
17	Legal and professional services	17	879	25	Utilities	25	172
				26	Wages (less employment credits)	26	
				27a	Other expenses (from line 48)	27a	6,069
				b	**Reserved for future use**	27b	

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28	**Total expenses** before expenses for business use of home. Add lines 8 through 27a ▶	28	374,651
29	Tentative profit or (loss). Subtract line 28 from line 7	29	27,454
30	Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions. **Simplified method filers only:** enter the total square footage of: (a) your home: 2592 and (b) the part of your home used for business: 200 . Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30	30	1,000
31	**Net profit or (loss).** Subtract line 30 from line 29. • If a profit, enter on both **Schedule 1 (Form 1040), line 3** and on **Schedule SE, line 2.** (If you checked the box on line 1, see instructions). Estates and trusts, enter on **Form 1041, line 3.** • If a loss, you **must** go to line 32.	31	26,454
32	If you have a loss, check the box that describes your investment in this activity. See instructions. • If you checked 32a, enter the loss on both **Schedule 1 (Form 1040), line 3** and on **Schedule SE, line 2.** (If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on **Form 1041, line 3.** • If you checked 32b, you **must** attach **Form 6198.** Your loss may be limited.	32a [ ] All investment is at risk. 32b [ ] Some investment is not at risk.	

Ben F. Johnson [redacted]

Schedule C (Form 1040) 2021 Hunt Club

Part III Cost of Goods Sold (see instructions)

33 Method(s) used to value closing inventory: a ☐ Cost b ☐ Lower of cost or market c ☐ Other (attach explanation)

34 Was there any change in determining quantities, costs, or valuations between opening and closing inventory? If "Yes," attach explanation ☐ Yes ☐ No

35	Inventory at beginning of year. If different from last year's closing inventory, attach explanation	35	
36	Purchases less cost of items withdrawn for personal use	36	
37	Cost of labor. Do not include any amounts paid to yourself	37	
38	Materials and supplies	38	
39	Other costs	39	
40	Add lines 35 through 39	40	
41	Inventory at end of year	41	
42	**Cost of goods sold.** Subtract line 41 from line 40. Enter the result here and on line 4	42	

Part IV Information on Your Vehicle. Complete this part **only** if you are claiming car or truck expenses on line 9 and are not required to file Form 4562 for this business. See the instructions for line 13 to find out if you must file Form 4562.

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43 When did you place your vehicle in service for business purposes? (month, day, year) ▶

44 Of the total number of miles you drove your vehicle during 2021, enter the number of miles you used your vehicle for:

a Business b Commuting (see instructions) c Other

45	Was your vehicle available for personal use during off-duty hours?	☐ Yes	☐ No	
46	Do you (or your spouse) have another vehicle available for personal use?	☐ Yes	☐ No	
47a	Do you have evidence to support your deduction?	☐ Yes	☐ No	
b	If "Yes," is the evidence written?	☐ Yes	☐ No	

Part V Other Expenses. List below business expenses not included on lines 8-26 or line 30.

Dues & Subscribtions	3,162
Postage	718
Gifts	891
Telephone	1,298

48	**Total other expenses.** Enter here and on line 27a	48	6,069

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

2021

Attachment Sequence No. **12**

Name(s) shown on return: **Ben F. & [redacted] Johnson**

Your social security number: [redacted]

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes ☒ No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Part 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	122,405	123,406	0	-1,001
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 the back	7	-1,001

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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	43,475	34,242	0	9,233
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	517	402	0	115
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 the instructions	13	1,367
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 the back	15	10,715

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	9,714
	• 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) **Note:** When figuring which amount is smaller, treat both amounts as positive numbers.	21	( )
22	Do you have qualified dividends on Form 1040, 1040-SR, or Form 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.		

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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

2021

Attachment Sequence No. **12A**

Name(s) shown on return

Ben F. & [redacted] Johnson

Social security number or taxpayer identification number

[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) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
Short Term A	Various	Various	122,405	123,406			-1,001

Form 8949 (2021) Attachment Sequence No. **12A** Page **2**

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side | **Social security number or taxpayer identification number**

Ben F. & [redacted] Johnson [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) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions. (f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
Long Term - D	Various	Various	43,475	34,242			9,233
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) ▶			43,475	34,242		0	9,233

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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.

Form 8949 (2021) Attachment Sequence No. 12A Page 2

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

Ben F. & [redacted] Johnson [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) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
Long-Term - E	Various	Various	517	402			115
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) ▶			517	402		0	115

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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.

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

2021

Attachment Sequence No. 13

Name(s) shown on return

Your social security number

Ben F. & [redacted] Johnson [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 2021 that would require you to file Form(s) 1099? See instructions	Yes	[X] 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	[redacted]				
B					
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			B			
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	9,000		
4	Royalties received	4			
Expenses:					
5	Advertising	5			
6	Auto and travel (see instructions)	6			
7	Cleaning and maintenance	7			
8	Commissions	8			
9	Insurance	9	1,264		
10	Legal and other professional fees	10	50		
11	Management fees	11			
12	Mortgage interest paid to banks, etc. (see instructions)	12			
13	Other interest	13			
14	Repairs	14	2,257		
15	Supplies	15	1,894		
16	Taxes	16	1,490		
17	Utilities	17			
18	Depreciation expense or depletion	18	5,250		
19	Other (list) ▶ See Statement 1	19	95		
20	Total expenses. Add lines 5 through 19	20	12,300		
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	-3,300		
22	Deductible rental real estate loss after limitation, if any, on **Form 8582** (see instructions)	22	(4,263)	( )	( )
23a	Total of all amounts reported on line 3 for all rental properties	23a		9,000	
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			
d	Total of all amounts reported on line 18 for all properties	23d		5,250	
e	Total of all amounts reported on line 20 for all properties	23e		12,300	
24	**Income.** Add positive amounts shown on line 21. **Do not** include any losses	24			0
25	**Losses.** Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25			(4,263)
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			-4,263

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Schedule E (Form 1040) 2021 Attachment Sequence No. 13 Page 2

Name(s) shown on return. Do not enter name and social security number if shown on other side. Your social security number

Ben F. & [redacted] Johnson [redacted]

Caution: The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

Part II Income or Loss From Partnerships and S Corporations – **Note:** If you report a loss, receive a distribution, dispose of stock, or receive a loan repayment from an S corporation, you **must** check the box in column **(e)** on line 28 and attach the required basis computation. If you report a loss from an at-risk activity for which **any** amount is **not** at risk, you **must** check the box in column **(f)** on line 28 and attach **Form 6198.** See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section ☐ Yes ☒ No

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if basis computation is required	(f) Check if any amount is not at risk
A	Surety Bank	S		[redacted]	X	
B						
C						
D						

	Passive Income and Loss		Nonpassive Income and Loss		
	(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss allowed (see Schedule K-1)	(j) Section 179 expense deduction from Form 4562	(k) Nonpassive income from Schedule K-1
A	0	4,266			
B					
C					
D					
29a Totals		4,266			
b Totals					

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30	Add columns (h) and (k) of line 29a	4,266
31	Add columns (g), (i), and (j) of line 29b	(0)
32	**Total partnership and S corporation income or (loss).** Combine lines 30 and 31	4,266

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A		
B		

	Passive Income and Loss		Nonpassive Income and Loss	
	(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A				
B				
34a Totals				
b Totals				

35	Add columns (d) and (f) of line 34a	
36	Add columns (c) and (e) of line 34b	( )
37	**Total estate and trust income or (loss).** Combine lines 35 and 36	

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs)—Residual Holder

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b

39	Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below	

Part V Summary

40	Net farm rental income or (loss) from **Form 4835.** Also, complete line 42 below		
41	**Total income or (loss).** Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Schedule 1 (Form 1040), line 5 ▶		3
42	**Reconciliation of farming and fishing income.** Enter your **gross** farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120-S), box 17, code AD; and Schedule K-1 (Form 1041), box 14, code F. See instructions		
43	**Reconciliation for real estate professionals.** If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040, Form 1040-SR, or Form 1040-NR from all rental real estate activities in which you materially participated under the passive activity loss rules		

SCHEDULE SE (Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Self-Employment Tax

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

OMB No. 1545-0074

2021

Attachment Sequence No. **17**

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

Ben F. Johnson

Social security number of person with **self-employment** income ▶ [redacted]

Part I Self-Employment Tax

Note: If your only income subject to self-employment tax is **church employee income,** see instructions for how to report your income and the definition of church employee income.

A If you are a minister, member of a religious order, or Christian Science practitioner **and** you filed Form 4361, but you had $400 or more of **other** net earnings from self-employment, check here and continue with Part I ▶ ☐

Skip lines 1a and 1b if you use the farm optional method in Part II. See instructions.

1a	Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A	1a	
b	If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code AH	1b	( )

Skip line 2 if you use the nonfarm optional method in Part II. See instructions.

2	Net profit or (loss) from Schedule C, line 31; and Schedule K-1 (Form 1065), box 14, code A (other than farming). See instructions for other income to report or if you are a minister or member of a religious order	2	26,454
3	Combine lines 1a, 1b, and 2	3	26,454
4a	If line 3 is more than zero, multiply line 3 by 92.35% (0.9235). Otherwise, enter amount from line 3	4a	24,430
	Note: If line 4a is less than $400 due to Conservation Reserve Program payments on line 1b, see instructions.		
b	If you elect one or both of the optional methods, enter the total of lines 15 and 17 here	4b	
c	Combine lines 4a and 4b. If less than $400, **stop;** you don't owe self-employment tax. **Exception:** If less than $400 and you had **church employee income,** enter -0- and continue ▶	4c	24,430
5a	Enter your **church employee income** from Form W-2. See instructions for definition of church employee income	5a	
b	Multiply line 5a by 92.35% (0.9235). If less than $100, enter -0-	5b	0
6	Add lines 4c and 5b	6	24,430
7	Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2021	7	142,800
8a	Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If $142,800 or more, skip lines 8b through 10, and go to line 11	8a	45,390
b	Unreported tips subject to social security tax from Form 4137, line 10	8b	
c	Wages subject to social security tax from Form 8919, line 10	8c	
d	Add lines 8a, 8b, and 8c	8d	45,390
9	Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11 ▶	9	97,410
10	Multiply the **smaller** of line 6 or line 9 by 12.4% (0.124)	10	3,029
11	Multiply line 6 by 2.9% (0.029)	11	708
12	**Self-employment tax.** Add lines 10 and 11. Enter here and on **Schedule 2 (Form 1040), line 4**	12	3,737
13	**Deduction for one-half of self-employment tax.** Multiply line 12 by 50% (0.50). Enter the result here and on **Schedule 1 (Form 1040), line 15**	13	1,869

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

Farm Optional Method. You may use this method **only** if **(a)** your gross farm income[1] wasn't more than $8,820, **or (b)** your net farm profits[2] were less than $6,367.

14	Maximum income for optional methods	14	5,880
15	Enter the **smaller** of: two-thirds (2/3) of gross farm income[1] (not less than zero) **or** $5,880. Also include this amount on line 4b above	15	

Nonfarm Optional Method. You may use this method **only** if **(a)** your net nonfarm profits[3] were less than $6,367 and also less than 72.189% of your gross nonfarm income,[4] **and (b)** you had net earnings from self-employment of at least $400 in 2 of the prior 3 years. **Caution:** You may use this method no more than five times.

16	Subtract line 15 from line 14	16	
17	Enter the **smaller** of: two-thirds (2/3) of gross nonfarm income[4] (not less than zero) **or** the amount on line 16. Also, include this amount on line 4b above	17	

[1] From Sch. F, line 9; and Sch. K-1 (Form 1065), box 14, code B.

[2] From Sch. F, line 34; and Sch. K-1 (Form 1065), box 14, code A — minus the amount you would have entered on line 1b had you not used the optional method.

[3] From Sch. C, line 31; and Sch. K-1 (Form 1065), box 14, code A.

[4] From Sch. C, line 7; and Sch. K-1 (Form 1065), box 14, code C.

Form **1116**

Department of the Treasury
Internal Revenue Service (99)

Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.

▶ Go to *www.irs.gov/Form1116* for instructions and the latest information.

OMB No. 1545-0121

2021

Attachment Sequence No. **19**

Name

Ben F. Johnson

Identifying number as shown on page 1 of your tax return

[redacted]

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

a ☐ Section 951A category income
b ☐ Foreign branch category income
c ☒ Passive category income
d ☐ General category income
e ☐ Section 901(j) income
f ☐ Certain income re-sourced by treaty
g ☐ Lump-sum distributions

h Resident of (name of country) ▶ **US United States**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for category checked above)

		Foreign Country or U.S. Possession			Total	
		A OC	B OC	C		(Add cols. A, B, and C.)
i	Enter the name of the foreign country or U.S. possession ▶	Various	Other Countries			
1a	Gross income from sources within country shown above and of the type checked above (see instructions):					
	Dividends & Interest		685		1a	685
b	Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is $250,000 or more, and you used an alternative basis to determine its source. See instructions ☐					
	Deductions and losses (Caution: See instructions.):					
2	Expenses **definitely related** to the income on line 1a (attach statement)					
3	**Pro rata share of other deductions not definitely related:**					
a	Certain itemized deductions or standard	26,450	26,450			
b	deduction (see instructions) Other deds. (attach stmt.)					
c	Add lines 3a and 3b	26,450	26,450			
d	Gross foreign source income (see instructions)		1,691			
e	Gross income from all sources (see instructions)	788,960	788,960			
f	Divide line 3d by line 3e (see instructions)		0.0021			
g	Multiply line 3c by line 3f		57			
4	Pro rata share of interest expense (see instructions):					
a	Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)					
b	Other interest expense					
5	Losses from foreign sources					
6	Add lines 2, 3g, 4a, 4b, and 5		57		6	57
7	Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				7	628

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Part II Foreign Taxes Paid or Accrued (see instructions)

Country	Credit is claimed for taxes (you must check one) (j) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add cols. (q) through (t))
	(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest		(q) Dividends	(r) Rents and royalties	(s) Interest		
A										
B	1099 Tax					50				50
C										
8	Add lines A through C, column (u). Enter the total here and on line 9, page 2 ▶								8	50

For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2021)

DAA

Ben F. Johnson [redacted]2

Form 1116 (2021)

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	50	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	50	
12	Reduction in foreign taxes (see instructions)	12	( )	
13	Taxes reclassified under high tax kickout (see instructions)	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit			14 50
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions	15	628	
16	Adjustments to line 15 (see instructions)	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	628	
18	**Individuals:** Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. **Estates and trusts:** Enter your taxable income without the deduction for your exemption. **Caution:** If you figured your tax using the lower rates on qualified dividends or capital gain, see instructions.	18	351,409	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"			19 0.0018
20	**Individuals:** Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. **Estates and trusts:** Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 **Caution:** If you are completing line 20 for separate category **g** (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.			20 75,444
21	Multiply line 20 by line 19 (maximum amount of credit)			21 134
22	Increase in limitation (section 960 (c))			22
23	Add lines 21 and 22			23 134
24	Enter the **smaller** of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV See instructions ▶			24 50

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Part IV Summary of Credits From Separate Parts III (see instructions)

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31			32
33	Enter the **smaller** of line 20 or line 32			33 50
34	Reduction of credit for international boycott operations. See instructions for line 12			34
35	Subtract line 34 from line 33. This is your **foreign tax credit.** Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a ▶			35 50

Form **4797**

Department of the Treasury
Internal Revenue Service

Sales of Business Property
(Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2))

▶ Attach to your tax return.

▶ Go to *www.irs.gov/Form4797* for instructions and the latest information.

OMB No. 1545-0184

2021

Attachment Sequence No. **27**

Name(s) shown on return

Ben F. & [redacted] Johnson

Identifying number

[redacted]

1a	Enter the gross proceeds from sales or exchanges reported to you for 2021 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20. See instructions	1a	
b	Enter the total amount of gain that you are including on lines 2, 10, and 24 due to the partial dispositions of MACRS assets	1b	
c	Enter the total amount of loss that you are including on lines 2 and 10 due to the partial dispositions of MACRS assets	1c	

Part I **Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft—Most Property Held More Than 1 Year** (see instructions)

2 (a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
From K1						-3

3	Gain, if any, from Form 4684, line 39	3	
4	Section 1231 gain from installment sales from Form 6252, line 26 or 37	4	
5	Section 1231 gain or (loss) from like-kind exchanges from Form 8824	5	
6	Gain, if any, from line 32, from other than casualty or theft	6	
7	Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows	7	-3
	Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.		
	Individuals, partners, S corporation shareholders, and all others. If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you didn't have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.		
8	Nonrecaptured net section 1231 losses from prior years. See instructions	8	
9	Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return. See instructions	9	

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Part II **Ordinary Gains and Losses** (see instructions)

10 Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

11	Loss, if any, from line 7	11	(-3)
12	Gain, if any, from line 7 or amount from line 8, if applicable	12	
13	Gain, if any, from line 31	13	
14	Net gain or (loss) from Form 4684, lines 31 and 38a	14	
15	Ordinary gain from installment sales from Form 6252, line 25 or 36	15	
16	Ordinary gain or (loss) from like-kind exchanges from Form 8824	16	
17	Combine lines 10 through 16	17	-3
18	For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below.		
a	If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions	18a	
b	Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Schedule 1 (Form 1040), Part I, line 4	18b	-3

There are no amounts for Page 2

Form **8995-A**

Department of the Treasury
Internal Revenue Service

Qualified Business Income Deduction

▶ Attach to your tax return.
▶ Go to *www.irs.gov/Form8995A* for instructions and the latest information.

OMB No. 1545-2294
2021
Attachment Sequence No. **55A**

Name(s) shown on return
Ben F. & [redacted] Johnson

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 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 above $164,900 ($164,925 if married filing separately; $329,800 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

Part I Trade, Business, or Aggregation Information

Complete Schedules A, B, and/or C (Form 8995-A), as applicable, before starting Part I. Attach additional worksheets when needed. See instructions.

1	(a) Trade, business, or aggregation name	(b) Check if specified service	(c) Check if aggregation	(d) Taxpayer identification number	(e) Check if patron
A	Surety Bank	☐	☐	[redacted]	☐
B	Farmton Hunt Club	☐	☐	[redacted]	☐
C		☐	☐		☐

Part II Determine Your Adjusted Qualified Business Income

			A	B	C
2	Qualified business income from the trade, business, or aggregation. See instructions	2	3,790	21,859	
3	Multiply line 2 by 20% (0.20). If your taxable income is $164,900 or less ($164,925 if married filing separately; $329,800 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	3	758	4,372	
4	Allocable share of W-2 wages from the trade, business, or aggregation	4	2,061	0	
5	Multiply line 4 by 50% (0.50)	5	1,031	0	
6	Multiply line 4 by 25% (0.25)	6	515	0	
7	Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	7	1,724	118,888	
8	Multiply line 7 by 2.5% (0.025)	8	43	2,972	
9	Add lines 6 and 8	9	558	2,972	
10	Enter the greater of line 5 or line 9	10	1,031	2,972	
11	W-2 wage and UBIA qualified property limitation. Enter the smaller of line 3 or line 10	11	758	2,972	
12	Phased-in reduction. Enter the amount from line 26, if any	12		3,807	
13	Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	13	758	3,807	
14	Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions	14			
15	Qualified business income component. Subtract line 14 from line 13	15	758	3,807	
16	Total qualified business income component. Add all amounts reported on line 15 ▶	16	4,565		

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Part III Phased-in Reduction

Complete Part III only if your taxable income is more than $164,900 but not $214,900 ($164,925 and $214,925 if married filing separately; $329,800 and $429,800 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

				A	B	C
17	Enter the amounts from line 3		17		4,372	
18	Enter the amounts from line 10		18		2,972	
19	Subtract line 18 from line 17		19		1,400	
20	Taxable income before qualified business income deduction	370,123				
21	Threshold. Enter $164,900 ($164,925 if married filing separately; $329,800 if married filing jointly)	329,800				
22	Subtract line 21 from line 20	40,323				
23	Phase-in range. Enter $50,000 ($100,000 if married filing jointly)	100,000				
24	Phase-in percentage. Divide line 22 by line 23	40.3230 %				
25	Total phase-in reduction. Multiply line 19 by line 24		25		565	
26	Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business		26		3,807	

Part IV Determine Your Qualified Business Income Deduction

27	Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16	27	4,565		
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions	28	99		
29	Qualified REIT dividends and PTP (loss) carryforward from prior years	29	( )		
30	Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0-	30	99		
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	20		
32	Qualified business income deduction before the income limitation. Add lines 27 and 31 ▶			32	4,585
33	Taxable income before qualified business income deduction	33	370,123		
34	Net capital gain. See instructions	34	18,716		
35	Subtract line 34 from line 33. If zero or less, enter -0-			35	351,407
36	Income limitation. Multiply line 35 by 20% (0.20)			36	70,281
37	Qualified business income deduction before the domestic production activities deduction (DPAD) under section 199A(g). Enter the smaller of line 32 or line 36 ▶			37	4,585
38	DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don't enter more than line 33 minus line 37 ▶			38	
39	Total qualified business income deduction. Add lines 37 and 38 ▶			39	4,585
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-			40	(0)

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SCHEDULE C (Form 8995-A)

Department of the Treasury
Internal Revenue Service

Loss Netting and Carryforward

▶ Attach to Form 8995-A.

▶ Go to *www.irs.gov/Form8995A* for instructions and the latest information.

OMB No. 1545-2294

2021

Attachment Sequence No. **55D**

Name(s) shown on return

Ben F. & [redacted] Johnson

Your taxpayer identification number

[redacted]

If you have more than three trades, businesses, or aggregations, complete and attach as many Schedules C as needed. See instructions.

1 Trade, business, or aggregation name	(a) Qualified business income/(loss)	(b) Reduction for loss netting (see instructions)	(c) Adjusted qualified business income (Combine (a) and (b). If zero or less, enter -0-.)
Surety Bank	4,263	(473)	3,790
Farmton Hunt Club	24,585	(2,726)	21,859
		( )	

2	Qualified business net (loss) carryforward from prior years. See instructions	2	(3,199)
3	Total of the trades, businesses, or aggregations losses. Combine the negative amounts on lines 1, column (a), and 2 for all trades, businesses, or aggregations	3	(3,199)
4	Total of the trades, businesses, or aggregations income. Add the positive amounts on line 1, column (a), for all trades, businesses, or aggregations	4	28,848
5	Losses netted with income of other trades, businesses, or aggregations. Enter in the parentheses on line 5 the smaller of the absolute value of line 3 or line 4. Allocate this amount to each of the trades, businesses, or aggregations on line 1, column (b).	5	(3,199)
6	Qualified business net (loss) carryforward. Subtract line 5 from line 3. If zero or more, enter -0-	6	( )

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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

2021

Attachment Sequence No. 72

Name(s) shown on your tax return

Ben F. & [redacted] Johnson

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	113
2	Ordinary dividends (see instructions)			2	13,649
3	Annuities (see instructions)			3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a	3		
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	3
5a	Net gain or loss from disposition of property (see instructions)	5a	9,711		
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	9,711
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	23,476

Part II Investment Expenses Allocable to Investment Income and Modifications

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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	23,476
	Individuals:				
13	Modified adjusted gross income (see instructions)	13	397,173		
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	147,173		
16	Enter the smaller of line 12 or line 15			16	23,476
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	892
	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 line 18a (see instructions). If zero or less, enter -0-	18c			
19a	Adjusted gross income (see instructions)	19a			
b	Highest tax bracket for estates and trusts for 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	

Form **4562**

Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization
(Including Information on Listed Property)

▶ Attach to your tax return.

▶ Go to *www.irs.gov/Form4562* for instructions and the latest information.

OMB No. 1545-0172

2021

Attachment Sequence No. **179**

Name(s) shown on return: Ben F. & [redacted] e Johnson

Identifying number: [redacted]

Business or activity to which this form relates: Hunt Club

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	1,050,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,620,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	

6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost

7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2020 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions	11	
12	Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	
13	Carryover of disallowed deduction to 2022. Add lines 9 and 10, less line 12 ▶	13	

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

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14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year. See instructions	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Don't include listed property. See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2021	17	122
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B—Assets Placed in Service During 2021 Tax Year Using the General Depreciation System

	(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only–see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a	3-year property						
b	5-year property						
c	7-year property						
d	10-year property						
e	15-year property						
f	20-year property						
g	25-year property			25 yrs.		S/L	
h	Residential rental property			27.5 yrs.	MM	S/L	
				27.5 yrs.	MM	S/L	
i	Nonresidential real property			39 yrs.	MM	S/L	
					MM	S/L	

Section C—Assets Placed in Service During 2021 Tax Year Using the Alternative Depreciation System

20a	Class life					S/L	
b	12-year			12 yrs.		S/L	
c	30-year			30 yrs.	MM	S/L	
d	40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	38
22	**Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	160
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Listed Property (Include automobiles, certain other vehicles, certain aircraft, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A—Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No 24b If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use. See instructions					25			
26 Property used more than 50% in a qualified business use:								
Computer	05/30/16	100.00 %	1,337	668	5.0	200DBHY	38	
		%						
27 Property used 50% or less in a qualified business use:								
		%				S/L-		
		%				S/L-		
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1					28		38	
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1								29

Section B—Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

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	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
30 Total business/investment miles driven during the year (**don't** include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year. Add lines 30 through 32												
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
34 Was the vehicle available for personal use during off-duty hours?												
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

Section C—Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **aren't** more than 5% owners or related persons. See instructions.

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? See instructions		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," don't complete Section B for the covered vehicles.

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2021 tax year (see instructions):					
43 Amortization of costs that began before your 2021 tax year				43	
44 **Total.** Add amounts in column (f). See the instructions for where to report				44	

Form **4562**

Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization
(Including Information on Listed Property)

▶ Attach to your tax return.

▶ Go to *www.irs.gov/Form4562* for instructions and the latest information.

OMB No. 1545-0172

2021

Attachment Sequence No. **179**

Name(s) shown on return

Ben F. & [redacted] Johnson

Identifying number [redacted]

Business or activity to which this form relates

Residental Rental - [redacted]

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	1,050,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,620,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	

6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost

7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2020 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions	11	
12	Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	
13	Carryover of disallowed deduction to 2022. Add lines 9 and 10, less line 12 ▶	13	

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

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14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year. See instructions	14	5,250
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Don't include listed property. See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2021	17	0
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B—Assets Placed in Service During 2021 Tax Year Using the General Depreciation System

	(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only–see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a	3-year property						
b	5-year property						
c	7-year property						
d	10-year property						
e	15-year property						
f	20-year property						
g	25-year property			25 yrs.		S/L	
h	Residential rental property			27.5 yrs.	MM	S/L	
				27.5 yrs.	MM	S/L	
i	Nonresidential real property			39 yrs.	MM	S/L	
					MM	S/L	

Section C—Assets Placed in Service During 2021 Tax Year Using the Alternative Depreciation System

20a	Class life					S/L	
b	12-year			12 yrs.		S/L	
c	30-year			30 yrs.	MM	S/L	
d	40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	**Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	5,250
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

There are no amounts for Page 2

Form **7203**
(December 2021)
Department of the Treasury
Internal Revenue Service

S Corporation Shareholder Stock and Debt Basis Limitations

▶ Attach to your tax return.
▶ Go to *www.irs.gov/Form7203* for instructions and the latest information.

OMB No. 1545-2302

Attachment Sequence No. 203

Name(s) shown on return
Ben F. Johnson

Identifying number [redacted]

Name of S corporation
Surety Bank

Employer identification number [redacted]

Stock block (see instructions) ▶

Part I Shareholder Stock Basis

1	Stock basis at the beginning of the corporation's tax year			1	11,190
2	Basis from any capital contributions made or additional stock acquired during the tax year			2	
3a	Ordinary business income (enter losses in Part III)	3a	4,266		
b	Net rental real estate income (enter losses in Part III)	3b			
c	Other net rental income (enter losses in Part III)	3c			
d	Interest income	3d			
e	Ordinary dividends	3e	6		
f	Royalties	3f			
g	Net capital gains (enter losses in Part III)	3g			
h	Net section 1231 gain (enter losses in Part III)	3h			
i	Other income (enter losses in Part III)	3i			
j	Excess depletion adjustment	3j			
k	Tax-exempt income	3k			
l	Recapture of business credits	3l			
m	Other items that increase stock basis	3m			
4	Add lines 3a through 3m			4	4,272
5	Stock basis before distributions. Add lines 1, 2, and 4			5	15,462
6	Distributions (excluding dividend distributions)			6	1,870
	Note: If line 6 is larger than line 5, subtract line 5 from line 6 and report the result as a capital gain on Form 8949 and Schedule D. See instructions.				
7	Stock basis after distributions. Subtract line 6 from line 5. If the result is zero or less, enter -0-, skip lines 8 through 14, and enter -0- on line 15			7	13,592
8a	Nondeductible expenses	8a			
b	Depletion for oil and gas	8b			
c	Business credits (sections 50(c)(1) and (5))	8c			
9	Add lines 8a through 8c			9	
10	Stock basis before loss and deduction items. Subtract line 9 from line 7. If the result is zero or less, enter -0-, skip lines 11 through 14, and enter -0- on line 15			10	13,592
11	Allowable loss and deduction items. Enter the amount from line 47, column (c)			11	3
12	Debt basis restoration (see net increase in instructions for line 23)			12	
13	Other items that decrease stock basis			13	
14	Add lines 11, 12, and 13			14	3
15	**Stock basis at the end of the corporation's tax year.** Subtract line 14 from line 10. If the result is zero or less, enter -0-			15	13,589

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Part II Shareholder Debt Basis

Section A—Amount of Debt (If more than three debts, see instructions.)

	Description	Debt 1 ☐ Formal note ☒ Open account debt	Debt 2 ☐ Formal note ☐ Open account debt	Debt 3 ☐ Formal note ☐ Open account debt	Total
16	Loan balance at the beginning of the corporation's tax year				
17	Additional loans (see instructions)				
18	Loan balance before repayment. Combine lines 16 and 17				
19	Principal portion of debt repayment (this line doesn't include interest)	( )	( )	( )	( )
20	Loan balance at the end of the corporation's tax year. Combine lines 18 and 19				

Part II Shareholder Debt Basis *(continued)*

Section B—Adjustments to Debt Basis

	Description	Debt 1	Debt 2	Debt 3	Total
21	Debt basis at the beginning of the corporation's tax year				
22	Enter the amount, if any, from line 17				
23	Debt basis restoration (see instructions)				
24	Debt basis before repayment. Combine lines 21, 22, and 23			[redacted]	
25	Divide line 24 by line 18				
26	Nontaxable debt repayment. Multiply line 25 by line 19				
27	Debt basis before nondeductible expenses and losses. Subtract line 26 from line 24	0			
28	Nondeductible expenses and oil and gas depletion deductions in excess of stock basis				
29	Debt basis before losses and deductions. Subtract line 28 from line 27. If the result is zero or less, enter -0-	0			
30	Allowable losses in excess of stock basis. Enter the amount from line 47, column (d)				
31	**Debt basis at the end of the corporation's tax year.** Subtract line 30 from line 29. If the result is zero or less, enter -0-	0			

Section C—Gain on Loan Repayment

32	Repayment. Enter the amount from line 19				
33	Nontaxable repayments. Enter the amount from line 26				
34	**Reportable gain.** Subtract line 33 from line 32	0			

Part III Shareholder Allowable Loss and Deduction Items

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	Description	(b) Current year losses and deductions	(b) Carryover amounts (column (e)) from the previous year	(c) Allowable loss from stock basis	(d) Allowable loss from debt basis	(e) Carryover amounts
35	Ordinary business loss					
36	Net rental real estate loss					
37	Other net rental loss					
38	Net capital loss					
39	Net section 1231 loss	3		3		
40	Other loss					
41	Section 179 deductions					
42	Charitable contributions					
43	Investment interest expense					
44	Section 59(e)(2) expenditures					
45	Other deductions					
46	Foreign taxes paid or accrued					
47	**Total loss.** Combine lines 35 through 46 for each column. Enter the total loss in column (c) on line 11 and enter the total loss in column (d) on line 30	3		3		

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

2021

Attachment Sequence No. **858**

Name(s) shown on return

Identifying number

Ben F. & [redacted] Johnson [redacted]

Part I 2021 Passive Activity Loss

Caution: Complete Parts IV and V 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 Part IV, column (a))	1a			
b	Activities with net loss (enter the amount from Part IV, column (b))	1b	(3,300)		
c	Prior years' unallowed losses (enter the amount from Part IV, column (c))	1c	(58,247)		
d	Combine lines 1a, 1b, and 1c			1d	-61,547
All Other Passive Activities					
2a	Activities with net income (enter the amount from Part V, column (a))	2a	4,266		
b	Activities with net loss (enter the amount from Part V, column (b))	2b	(3)		
c	Prior years' unallowed losses (enter the amount from Part V, column (c))	2c	( )		
d	Combine lines 2a, 2b, and 2c			2d	4,263
3	Combine lines 1d and 2d. 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 or 2c. Report the losses on the forms and schedules normally used			3	-57,284

If line 3 is a loss and:
- Line 1d is a loss, go to Part II.
- Line 2d is a loss (and line 1d is zero or more), skip Part II and go to line 10.

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. Instead, go to line 10.

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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.

4	Enter the **smaller** of the loss on line 1d or the loss on line 3			4	57,284
5	Enter $150,000. If married filing separately, see instructions	5	150,000		
6	Enter modified adjusted gross income, but not less than zero. See instructions	6	371,176		
	Note: If line 6 is greater than or equal to line 5, skip lines 7 and 8, enter -0- on line 9. Otherwise, go to line 7.				
7	Subtract line 6 from line 5	7			
8	Multiply line 7 by 50% (0.50). **Do not** enter more than $25,000. If married filing separately, see instructions			8	
9	Enter the **smaller** of line 4 or line 8			9	0

Part III Total Losses Allowed

10	Add the income, if any, on lines 1a and 2a and enter the total	10	4,266
11	**Total losses allowed from all passive activities for 2021.** Add lines 9 and 10. See instructions to find out how to report the losses on your tax return	11	4,266

Part IV Complete This Part Before Part I, 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
Residental Rental - [redacted]		3,300	58,247		61,547
Total. Enter on Part I, lines 1a, 1b, and 1c ▶		3,300	58,247		

Ben F. & [redacted] Johnson

[redacted]

Form 8582 (2021)

Part V Complete This Part Before Part I, Lines 2a, 2b, and 2c. See instructions.

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 2a)	(b) Net loss (line 2b)	(c) Unallowed loss (line 2c)	(d) Gain	(e) Loss
Surety Bank	4,266	3		4,263	
Total. Enter on Part I, lines 2a, 2b, and 2c ▶	4,266	3			

Part VI Use This Part if an Amount Is Shown on Part II, Line 9. 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 ▶			1.00		

Part VII Allocation of Unallowed Losses. See instructions

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Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Residental Rental - [redacted]	Sch E1	61,547	1.0000	57,284
Total ▶		61,547	1.00	57,284

Part VIII Allowed Losses. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
Residental Rental - [redacted]	Sch E1	61,547	57,284	4,263
Total ▶		61,547	57,284	4,263

[redacted] 03/[redacted]8/2022 12:57 PM

Form 1040 — Tax Return Reconciliation Worksheet — 2021

Filing Status: ☐ 1 Single ☒ 2 Married filing jointly ☐ 3 Married filing separately ☐ 4 Head of household* ☐ 5 Qualifying widow(er)*

MFS spouse name: *Qualifying person that is a child but not a dependent:

Taxpayer first name and initial	Last name	Taxpayer social security number
Ben F.	Johnson	[redacted]
If a joint return, spouse's first name and initial	Last name	Spouse social security number
[redacted]	Johnson	[redacted]

Home address (number and street). If you have a P.O. box, see instructions. PO Box 220169 — Apt. no. — Presidential Election Campaign: Taxpayer ☐ Spouse ☐

City, town or post office, state, and ZIP code. Glenwood FL 32722-0169

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

At anytime during 2021, did you receive, sell, send, exchange, or otherwise acquire financial interest in any virtual currency? Yes ☐ No ☒

6a ☒ **Taxpayer.** If someone can claim you as a dependent, **do not** check box 6a

b ☒ **Spouse**

Boxes checked on 6a and 6b	2
Children on 6c who lived with you	
Children on 6c who did not live with you	
Dependents on 6c not entered above	
Total. Add lines above	2

6c Dependents:

(1) First name / Last name	(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for: Child tax credit	(4) ✓ if qualifies for: Other dependents
			☐	☐
			☐	☐
			☐	☐
			☐	☐

If more than four dependents, ✓ here ☐

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Income (Schedule 1)	7	Wages, salaries, tips, etc. Attach Form(s) W-2		7	166,561
	8a	**Taxable interest.** Attach Schedule B if required		8a	113
	b	**Tax-exempt interest.** **Do not** include on line 8a	8b		
	9a	Ordinary dividends. Attach Schedule B if required		9a	13,649
	b	Qualified dividends	9b 9,002		
	10	Taxable refunds, credits, or offsets of state and local income taxes		10	
	11	Alimony received		11	
	12	Business income or (loss). Attach Schedule C or C-EZ		12	26,454
	13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐		13	9,714
	14	Other gains or (losses). Attach Form 4797		14	-3
	15a	IRA distributions	15a	b Taxable amount	15b
	16a	Pensions and annuities	16a 154,771	b Taxable amount	16b 154,685
	17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		17	3
	18	Farm income or (loss). Attach Schedule F		18	
	19	Unemployment compensation		19	
	20a	Social security benefits	20a 32,784	b Taxable amount	20b 27,866
	21	Other income. List type and amount		21	
	22	Combine the amounts in the far right column for lines 7 through 21. This is your **total income** ▶		22	399,042
Adjusted Gross Income (Schedule 1)	23	Educator expenses	23		
	24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24		
	25	Health savings account deduction. Attach Form 8889	25		
	26	Moving expenses. Attach Form 3903	26		
	27	Deductible part of self-employment tax. Attach Schedule SE	27	1,869	
	28	Self-employed SEP, SIMPLE, and qualified plans	28		
	29	Self-employed health insurance deduction	29		
	30	Penalty on early withdrawal of savings	30		
	31a	Alimony paid b Recipient's SSN ▶	31a		
	32	IRA deduction	32		
	33	Student loan interest deduction	33		
	34	Reserved for future use	34		
	35	Reserved for future use	35		
	36	Add lines 23 through 35		36	1,869
	37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶		37	397,173

Form **1040** | **Tax Return Reconciliation Worksheet, Page 2** | **2021**

Name **Ben F. & [redacted]e Johnson** | Tp TIN [redacted]

Tax and Credits (Schedules 2, 3)	38	Amount from line 37 (adjusted gross income)		38	397,173
	39a	Check if: [X] **You** were born before January 2, 1957, [ ] Blind. [ ] **Spouse** was born before January 2, 1957, [ ] Blind. } **Total boxes checked** ▶	39a 1		
	b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶	39b [ ]		
Standard Deduction for— • People who check any box on line 39a or 39b **or** who can be claimed as a dependent, see instructions. • All others: Single or Married filing separately, $12,550 Married filing jointly or Qualifying widow(er), $25,100 Head of household, $18,800	40	**Itemized deductions** (from Schedule A) **or** your **standard deduction** (see left margin)		40	26,450
	a	Charitable contributions if you take the standard deduction		40b	600
	41	Subtract line 40 and 40b from line 38		41	370,123
	42	Qualified business income deduction (see instructions)		42	4,585
	43	**Taxable income.** Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-		43	365,538
	44	**Tax** (see instr.). Check if any from: a [ ] Form(s) 8814 b [ ] Form 4972 c [ ]		44	75,444
	45	**Alternative minimum tax** (see instructions). Attach Form 6251		45	
	46	Excess advance premium tax credit repayment. Attach Form 8962		46	
	47	Add lines 44, 45, and 46 ▶		47	75,444
	48	Foreign tax credit. Attach Form 1116 if required	48 50		
	49	Credit for child and dependent care expenses. Attach Form 2441	49		
	50	Education credits from Form 8863, line 19	50		
	51	Retirement savings contributions credit. Attach Form 8880	51		
	52	Child tax credit/credit for other dependents	52		
	53	Residential energy credits. Attach Form 5695	53		
	54	Other credits from Form: a [ ] 3800 b [ ] 8801 c [ ]	54		
	55	Add lines 48 through 54. These are your **total credits**		55	50
	56	Subtract line 55 from line 47. If line 55 is more than line 47, enter -0- ▶		56	75,394
Other Taxes (Schedule 2)	57	Self-employment tax. Attach Schedule SE		57	3,737
	58	Unreported social security and Medicare tax from Form: a [ ] 4137 b [ ] 8919		58	
	59	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required		59	
	60a	Household employment taxes from Schedule H		60a	
	b	First-time homebuyer credit repayment. Attach Form 5405 if required		60b	
	61	Taxes from: a [ ] Form 8959 b [X] Form 8960 c [ ] Instructions; enter code(s)		61	892
[ ]	62	Section 965 net tax liability installment from Form 965-A	62		
	63	Add lines 56 through 61. This is your **total tax** ▶		63	80,023
Payments (Schedule 3)	64	Federal income tax withheld from:		64	
	a	Form(s) W-2	64a 48,246		
	b	Form(s) 1099	64b 39,419		
	c	Other forms	64c		
	65	2021 estimated tax payments and amount applied from 2020 return	65		
	66a	**Earned income credit (EIC)**	66a		
	b	Nontaxable combat pay election 66b			
	c	Prior year (2019) earned income 66c			
	67	Additional child tax credit. Attach Schedule 8812	67		
	68	American opportunity credit from Form 8863, line 8	68		
	69	Recovery rebate credit	69 0		
	70	Net premium tax credit. Attach Form 8962	70		
	71	Amount paid with request for extension to file	71		
	72	Excess social security and tier 1 RRTA tax withheld	72		
	73	Credit for federal tax on fuels. Attach Form 4136	73		
	74	Other payments and refundable credits	74		
	75	**Total pymts.** Add ln 64, 65,66a, 67-74.		75	87,665
Refund	76	If line 75 is more than line 63, subtract line 63 from line 75. This is the amount you **overpaid**		76	7,642
	77a	Amount of line 76 you want **refunded to you.** If Form 8888 is attached, check here ▶ [ ]		77a	7,642
	▶ b	Routing number [redacted] ▶ c Type: [ ] Checking [X] Savings			
	▶ d	Account number [redacted]			
	78	Amount of line 76 you want **applied to your** 2022 estimated tax ▶	78		
Amount You Owe	79	**Amount you owe.** Subtract line 75 from line 63. For details on how to pay, see instructions ▶		79	
	80	Estimated tax penalty (see instructions)	80		

Int/Pen Date filed | Int | Fail to file | Fail to pay | Total

Third Party Designee Do you want to allow another person to discuss this return with the IRS (see instructions)? [X] **Yes.** Complete below. [ ] **No** Personal identification no. (PIN) ▶ [redacted]
Designee's Name ▶ **Ronald J Cantlay** Phone no. ▶ **386-734-9441**

Other Info Taxpayer Daytime phone number | Taxpayer: Occupation **Retired** | IRS Identity Protection PIN
Spouse: Occupation [redacted] | IRS Identity Protection PIN
[ ] Taxpayer [ ] Spouse Email address

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Residental Rental - 2805 Grand Ave

Statement 1 - Schedule E, Line 19 - Other Expenses

Description	Gross Amount	Business Use Percentage	Net Amount
House Inspection	$ 95		$ 95
Total	$ 95		$ 95

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Form **1040** | **Shareholder's Basis Worksheet Page 1** | **2021**

Name: Ben F. Johnson

Taxpayer Identification Number: [redacted]

Name of Entity: Surety Bank

EIN [redacted]

Passive Activity Type: Other Passive

K1 Unit: 2

Shareholder Stock Basis

1.	Beginning of year stock basis. Per IRC 1367(a)(2) do not enter an amount below zero		11,190
	Increases to stock basis		
2.	Capital contributions made or additional stock acquired		
3.	Ordinary business income	4,266	
4.	Net rental real estate income		
5.	Other net rental income		
6.	Interest, dividends and royalties	6	
7.	Net capital gains		
8.	Net section 1231 gain and ordinary business gain		
9.	Tax-exempt interest, other tax-exempt income and recapture credits		
10.	Other income		
11.	Excess of deductions for depletion over basis of property (other than oil and gas)		
12.	Other increases to stock basis		
13.	Total increases to stock basis. Combine lines 2 through 12		4,272
14.	**Stock basis before distributions and items of loss or deductions.** Add line 1 and line 13 and enter the result here		15,462
	Decreases to stock basis		
15.	Distributions allowed		1,870
16.	**Stock basis after distributions and before items of loss or deductions.** Subtract line 15 from line 14. If zero or less, enter - 0 -		13,592
17.	Losses and deductions applied against stock basis. (See Shareholder Basis Worksheet Page 2)	3	
18.	Other decreases to stock basis		
19.	Amount used to restore loan basis		
20.	Total decreases (other than distributions) to stock basis. Combine lines 17 through 19		3
21.	**Stock basis at the end of year.** (Subtract line 20 from line 16) Enter if IRC 1367(a)(2) do not enter amount below zero		13,589

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Shareholder Loan Basis

Type of Loan: Formal Note ☐ Open account debt ☒

22.	Beginning of year loan basis. Per IRC 1367(b)(2)(A) do not enter an amount below zero		
23.	Loans to corporation		
24.	Loan basis restored from line 19 above		
25.	Other increases to loan basis		
26.	Loan repayments from line 40		
27.	**Loan basis before losses and deductions.** Combine lines 22 through 26		0
28.	Losses and deductions applied against loan basis. (See Shareholder Basis Worksheet Page 2)		
29.	Other decreases to loan basis		
30.	Total decreases to loan basis. Add lines 28 and 29		0
31.	**Loan basis at the end of year** (Subtract line 30 from line 27). Per IRC 1367(b)(2)(A) do not enter an amount below zero		0
32.	**Stock and loan basis at the end of the year** (Add lines 21 and line 31)		13,589

Gain Recognized on Excess Distributions

33.	Property distributions reported in Box 16, Code D, Schedule K-1 (1120S)	1,870
34.	Stock basis before distributions and loss items (line 14) less gain from the entire disposition of stock reported on line 18.	15,462
35.	**Total gain recognized on excess distributions.** (Subtract line 34 from line 33)	0

- Sch D/8949, short-term capital gain _____
- Sch D/8949, long-term capital gain _____

Gain Recognized on Repayment of Shareholder Loan

36.	Loan basis at beginning of tax year	
37.	Basis restored - amount used in prior years to offset losses	
38.	Loan basis before loan repayment. Add line 36 and line 37	
39.	Face amount of shareholder loan at beginning of tax year	
40.	Loan repayments to shareholder during tax year	
41.	Nontaxable return of loan basis. Divide line 38 by line 39 and multiply the result by line 40	
42.	**Gain recognized on repayment of shareholder loan** (Subtract line 41 from line 40)	

- Sch D/8949, short-term capital gain _____
- Sch D/8949, long-term capital gain _____
- Ordinary income on Form 4797 _____

Form **1040** | **Shareholder's Basis Worksheet Page 2** | **2021**

Name Ben F. Johnson | Id No. [redacted]2

Entity Name Surety Bank | EIN 59-0580845 | Passive Activity Type Other Passive | K1 Unit 2

Basis reduced by nondeductible items before loss and deduction items

Loss Allocated to Shareholder Stock and Loan Basis

	Suspended Losses	Current Year Loss	Total Loss	Percent	Allowed Stock Loss	Disallowed Stock Loss	Percent	Allowed Loan Loss	Disallowed Loss Carryforward	Total Allowed Loss
Nondeductible noncapital exp & oil/gas depletion deduction:				1.0000						
Losses and deductions:										
Ordinary business loss										
Net rental real estate loss										
Other net rental loss										
Short-term capital loss										
Long-term capital loss										
28% capital loss										
Section 1231 loss		3	3	1.0000	3					3
4797 - Ordinary loss										
Other portfolio loss										
1256 contracts and straddles										
Other losses - Schedule E										
Other losses - 1040 Sch 1										
Section 179 expense										
Cash contributions										
Cash contributions (30%)										
Noncash contributions (50%)										
Noncash contributions (30%)										
Cap gain prop 50% org (30%)										
Cap gain prop (20%)										
Portfolio deductions (other)										
Investment interest expense										
Depletion										
Deductions-royalty income										
Section 59(e)(2) expenditures										
Preproductive period exp.										
Reforestation expense ded.										
Other deductions										
Foreign taxes										
Total losses and deductions		3	3	1.0000	3					3
Total nonded and deductible items		3	3		3					3

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Form 1040 | Broker Reconciliation Worksheet | 2021

Name(s) of Account holder
Beth F. Johnson

Taxpayer identification number
[redacted]

Payer's name
National Financial Services LLC

Account number
[redacted]

Form/Schedule/Worksheet	Form/Sch Line No.	Form 1099 Name	Form 1099 Box No(s)	Amount
Schedule B				
Part I - Interest	1	1099-INT	1, 3, 10	1
Part II - Ordinary Dividends	5	1099-DIV	1a	13,643
Nondividend distributions		1099-DIV	3	
Schedule D				
Short-term 1099B transactions with no adjustments, basis reported to IRS	1a	1099-B		
Long-term 1099B transactions with no adjustments, basis reported to IRS	8a	1099-B		
Part II - Capital gain distributions	13	1099-DIV	2a	1,367
28% Rate Capital Gain Worksheet (Schedule D, line 18)	1, 4	1099-DIV, B	2d, 3	
Unrecaptured Section 1250 Gain Worksheet (Schedule D, line 19)	11	1099-DIV	2b	
Schedule A				
State and local income taxes withheld	5a	1099 ALL	17, 15, 16	
Foreign tax deduction	6	1099-INT, DIV	6, 7	
Form 1040				
Tax-exempt interest	2a	1099-INT	8	
Tax-exempt interest dividends	2a	1099-DIV	11	
Qualified dividends	3a	1099-DIV	1b	9,002
Penalty on early withdrawal of savings (Schedule 1)	18	1099-INT	2	
Foreign tax credit (Credit claimed without filing Form 1116) (Schedule 3)	1	1099-INT, DIV	6, 7	
Federal income tax withheld	25b	1099 ALL		
Section 199A dividends	13	1099-DIV	5	99
Form 1116				
Part II Foreign taxes paid or accrued	8	1099-INT, DIV	6, 7	50
Form 6251				
Interest from specified private activity bonds exempt from regular tax	2g	1099-INT	9	
Interest dividends from specified private activity bonds exempt from regular tax	2g	1099-DIV	12	
Form 8949				
Basis reported to IRS				
Short-term - 8949 Box A	1	1099-B		-1,001
Short-term - 8949 Box A (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box D	1	1099-B		9,233
Long-term - 8949 Box D (column g) - Wash sale loss disallowed *	1	1099-B		
Basis not reported to IRS				
Short-term - 8949 Box B	1	1099-B		
Short-term - 8949 Box B (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box E	1	1099-B		115
Long-term - 8949 Box E (column g) - Wash sale loss disallowed *	1	1099-B		
Not reported on Form 1099-B				
Short-term - 8949 Box C	1	1099-B		
Short-term - 8949 Box C (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F	1	1099-B		
Long-term - 8949 Box F (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F - Section 1202 gain exclusion adjustment	1	1099-DIV	2c	
Form 6781				
Net section 1256 contracts loss election				
Part I - Section 1256 Contracts Marked to Market	1	1099-B	11	
Form 1099-B adjustments	4			
Net section 1256 contracts loss carry back	6			
Form 4952				
Investment interest expenses - margin interest	1			

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* Form 8949 column (g), amount of adjustment, is reported as wash sale loss disallowed for any transaction with a "W" in column (f) Code(s) from instructions. Therefore, transactions with multiple codes in column (f), may not reflect the true disallowed wash sale loss.

Form 1040	Broker Capital Transactions Detail Summary Report	2021

Name(s) shown on return: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

	Broker Account Name	Account No.	T/S/J
A	National Financial Services LLC	[redacted]	T
B			
C			
D			
E			

	Column A	Column B	Column C	Column D	Column E	Total Col A - E*
Basis reported to the IRS						
Short-term - Sch D line 1a						
Proceeds +						
Basis -						
Gain/-Loss =						0
Long-term - Sch D line 8a						
Proceeds +						
Basis -						
Gain/-Loss =						0
Short-term - 8949 Box A / Sch D line 1b						
Proceeds +	122,405					122,405
Basis -	123,406					123,406
Adjustment +						
Gain/-Loss =	-1,001					-1,001
Long-term - 8949 Box D / Sch D line 8b						
Proceeds +	43,475					43,475
Basis -	34,242					34,242
Adjustment +						
Gain/-Loss =	9,233					9,233
Basis not reported to the IRS						
Short-term - 8949 Box B / Sch D line 2						
Proceeds +						
Basis -						
Adjustment +						
Gain/-Loss =						0
Long-term - 8949 Box E / Sch D line 9						
Proceeds +	517					517
Basis -	402					402
Adjustment +						
Gain/-Loss =	115					115
Not reported on 1099B/Substitute statement						
Short-term - 8949 Box C / Sch D line 3						
Proceeds +						
Basis -						
Adjustment +						
Gain/-Loss =						0
Long-term - 8949 Box F / Sch D line 10						
Proceeds +						
Basis -						
Adjustment +						
Gain/-Loss =						0
Account Total						
Proceeds +	166,397					166,397
Basis -	158,050					158,050
Adjustment +						
Gain/-Loss =	8,347					8,347

*Total column completed on last unit

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Form **1040** | **Qualified Dividends and Capital Gain Tax Worksheet** | **2021**

Name | Taxpayer Identification Number

Ben F. & [redacted] Johnson | [redacted]

1.	Enter the amount from Form 1040, 1040-SR, or 1040-NR, 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. 365,538	
2.	Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 3a*	2. 9,002	
3.	Are you filing Schedule D?* ☒ **Yes.** Enter the **smaller** of line 15 or 16 of Schedule D. If either line 15 or 16 is a loss, enter -0- ☐ **No.** Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 7	3. 9,714	
4.	Add lines 2 and 3	4. 18,716	
5.	Subtract line 4 from line 1. If zero or less, enter -0-	5. 346,822	
6.	Enter: $40,400 if single or married filing separately, $80,800 if married filing jointly or qualifying widow(er), $54,100 if head of household.	6. 80,800	
7.	Enter the smaller of line 1 or line 6	7. 80,800	
8.	Enter the smaller of line 5 or line 7	8. 80,800	
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. 18,716	
11.	Enter the amount from line 9	11. 0	
12.	Subtract line 11 from line 10	18,716	
13.	Enter: $445,850 if single, $250,800 if married filing separately, $501,600 if married filing jointly or qualifying widow(er), $473,750 if head of household.	13. 501,600	
14.	Enter the smaller of line 1 or line 13	14. 365,538	
15.	Add lines 5 and 9	15. 346,822	
16.	Subtract line 15 from line 14. If zero or less, enter -0-	16. 18,716	
17.	Enter the smaller of line 12 or line 16	17. 18,716	
18.	Multiply line 17 by 15% (0.15)		18. 2,807
19.	Add lines 9 and 17	19. 18,716	
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. 72,637
23.	Add lines 18, 21, and 22		23. 75,444
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. 78,626
25.	**Tax on all taxable income.** Enter the **smaller** of line 23 or line 24. Also include this amount on the entry space on Form 1040, 1040-SR, or 1040-NR, line 16. If you are filing Form 2555, do not enter this amount on the entry space on 1040, 1040-SR, or 1040-NR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet		25. 75,444

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*If you are filing Form 2555, these lines may be reduced (but not below zero) by your capital gain excess. Please refer to Foreign Earned Income Tax Worksheets - Excess Capital Gain for detail if the lines have been reduced.

Form **1040** | **Standard Deduction & Dependent MAGI Worksheets** | **2021**

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

Standard Deduction Worksheet

1. Enter the amount shown below for your filing status.
   - Single or Married filing separately - $12,550
   - Married filing jointly or qualifying widow(er) - $25,100
   - Head of household - $18,800

   1. 25,100
2. Can you (or your spouse if married, filing jointly) be claimed as a dependent?
   - [X] **No.** Skip line 3; enter the amount from line 1 on line 4.
   - [ ] **Yes.** Go to line 3.
3. Is your **earned income** more than $750?
   - [ ] **Yes.** Add $350 to your earned income. Enter the total.
   - [ ] **No.** Enter $1,100 ..... 3.
4. Enter the **smaller** of line 1 or line 3. If under 65 and not blind, continue to line 6. **Otherwise,** go to line 5. ..... 4. 25,100
5. Check if: [X] **You** were 65 or older, [ ] Blind; [ ] **Spouse** was 65 or older, [ ] Blind. **Total boxes checked** [1]
   If 65 or older or blind, multiply $1,350 ($1,700 if single or head of household) by the number in the box above 5. 1,350
6. Add lines 4 and 5. Enter the total here and on Form 1040 or 1040-SR, line 12 ..... 6. 26,450

Dependent Modified Adjusted Gross Income Worksheet

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

Form **1116** | **Foreign Tax Credit Worksheet** | **2021**

Name: **Ben F. & [redacted] Johnson**

Taxpayer Identification Number: [redacted]

If you have qualified dividends or capital gains, you may be required to use the worksheet on this page to make adjustments to those qualified dividends and gai before taking them into account on line 18. If you qualify for the adjustment exception as detailed in the Form 1116 instructions, no adjustment is necessary. If you figured your tax using the **Qualified Dividends and Capital Gain Tax Worksheet,** complete the worksheet as follows: Skip lines 2 through 5. On line 6, enter the amount from line 22 of the **Qualified Dividends and Capital Gain Tax Worksheet.** Complete all other lines as instructed on the worksheet.

Worksheet for Form 1116, Page 2, Line 18

1.	Enter the amount from Form 1040, Form 1040-SR or Form 1040NR, line 15		1. 365,538
2.	Enter your worldwide 28% gains (see instructions)	2.	
3.	Multiply line 2 by .2432	3.	
4.	Enter your worldwide 25% gains (see instructions)	4.	
5.	Multiply line 4 by .3243	5.	
6.	Enter your worldwide 20% gains and qualified dividends (see instructions)	6.	
7.	Multiply line 6 by .4595	7.	
8.	Enter your worldwide 15% gains and qualified dividends (see instructions)	8.	18,716
9.	Multiply line 8 by .5946	9.	11,129
10.	Enter your worldwide 0% gains and qualified dividends (see instructions)	10.	
11.	Add lines 3, 5, 7, 9 and 10		11. 11,129
12.	Subtract line 11 from line 1. Enter the result here and on Form 1116, line 18		12. 354,409

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Please refer to the Form 6251 instructions for the alternative minimum tax amounts reported on this worksheet

Worksheet for AMT Form 1116, Page 2, Line 18

1.	Enter the amount from Form 6251, line 4		1. 391,988
2.	Enter the amount from Form 6251, line 36	2.	
3.	Multiply line 2 by .1071	3.	
4.	Enter the amount from Form 6251, line 33	4.	
5.	Multiply line 4 by .2857	5.	
6.	Enter the amount from Form 6251, line 30	6.	18,716
7.	Multiply line 6 by .4643	7.	8,690
8.	Enter the amount from Form 6251, line 23	8.	
9.	Add lines 3, 5, 7 and 8		9. 8,690
10.	Subtract line 9 from line 1. Enter the result here and on the AMT Form 1116, line 18		10. 383,298

Form **1116** | **Foreign Tax Credit Worksheet B** | **2021**

Name | Taxpayer Identification Number

Ben F. & [redacted] Johnson | [redacted]

Regular Tax

	Category #1 Specify ▶ Passive Inc		Category #2 Specify ▶		
	(1) Short-Term	(2) Long-Term (15%)	(3) Short-Term	(4) Long-Term (15%)	(5) Other
1. Separate category rate group capital gain or (loss)		1,367			
2. U.S. capital loss adjustment amount					
3. Subtotal (subtract line 2 from line 1 gain amounts)		1,367			
4. Net U.S. long-term capital loss					
5. U.S. long-term capital loss adjustment					
6. Excess net U.S. long-term capital loss					
7. Long-term capital gain (or adjustment amount)					
8. Limitation percentage					
9. Long-term limitation amounts					
10. Adjustment amounts					
11. Rate differential adjustments					
12. Long-term gains					
13. Rate differential adjustment					
14. Long-term gain					
15. Adjusted separate category capital gains and losses		554			

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Alternative Minimum Tax

	Category #1 Specify ▶ Passive Inc		Category #2 Specify ▶		
	(1) Short-Term	(2) Long-Term (15%)	(3) Short-Term	(4) Long-Term (15%)	(5) Other
1. Separate category rate group capital gain or (loss)		1,367			
2. U.S. capital loss adjustment amount					
3. Subtotal (subtract line 2 from line 1 gain amounts)		1,367			
4. Net U.S. long-term capital loss					
5. U.S. long-term capital loss adjustment					
6. Excess net U.S. long-term capital loss					
7. Long-term capital gain (or adjustment amount)					
8. Limitation percentage					
9. Long-term limitation amounts					
10. Adjustment amounts					
11. Rate differential adjustments					
12. Long-term gains					
13. Rate differential adjustment					
14. Long-term gain					
15. Adjusted separate category capital gains and losses		732			

Form **1040** | **Foreign Tax Credit Carryover Worksheet** | **2021**

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

Foreign Income Category ..... Passive Income

Regular

	Foreign Taxes Available	Maximum Credit Allowable	Unused (+) or Excess (-)	Carryback Applied from CY	Carryforward Applied to CY	* CY Unused (+) or Excess (-)
2011	2	267	-265			-265
2012	24	58	-34			-34
2013	61	203	-142			-142
2014	24	178	-154			-154
2015	154	233	-79			-79
2016	150	243	-93			-93
2017	118	2,050	-1,932			-1,932
2018	72	125	-53			-53
2019	72	211	-139			-139
2020	35	132	-97			-97
2021	50	134	-84			-84

* Amounts flow to the Foreign Tax Credit Carryover Report

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Alternative Minimum Tax

	Foreign Taxes Available	Maximum Credit Allowable	Unused (+) or Excess (-)	Carryback Applied from CY	Carryforward Applied to CY	* CY Unused (+) or Excess (-)
2011	2	256	-254			-254
2012	24	71	-47			-47
2013	61	207	-146			-146
2014	24	184	-160			-160
2015	154	303	-149			-149
2016	150	296	-146			-146
2017	118	2,439	-2,321			-2,321
2018	72	85				
2019	72		29		29	
2020	35	65				
2021	50	168	-118		29	-89

* Amounts flow to the Foreign Tax Credit Carryover Report

Form 1040	Deduction for Business Use of Home - Simplified Method	2021

Name

Ben F. & [redacted] Johnson

Taxpayer Identification Number

[redacted]

Description Hunt Club Form/Schedule C Unit number 1

Simplified Method Worksheet

1.	Enter the amount of the gross income limitation	27,454
2.	Allowable square footage for the qualified business use. Do not enter more than 300 square feet.	200
3.	Simplified method amount	
	a. Maximum allowable amount	$5
	b. For daycare facilities not used exclusively for business, enter the decimal amount from the Daycare Facility Worksheet; otherwise, enter 1.0	1.00
	c. Multiply line 3a by the line 3b and enter result to 2 decimal places	5.00
4.	Multiply line 2 by line 3c	1,000
5.	**Allowable expenses using the simplified method.** Enter the smaller of line 1 or line 4. If zero or less, enter -0-.	1,000

6. Carryover of unallowed expenses from years simplified method was not used
   Enter the amounts, if any, from the most recent Form 8829 or Business Use of Home Worksheet
   a. Operating expenses.
   b. Excess casualty losses and depreciation.

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Daycare Facility Worksheet

1. Total hours of daycare use
2. Total hours available for use during the year
3. Divide line 1 by line 2. Enter the result as a decimal amount here and on line 3b of the Simplified Method Worksheet

Area Adjustment Worksheet - Area Changed During Year

1. Complete lines 1a through 1n when the area of the qualified business use was used for part of the year or the area used changed during the year.

	(i) Month	Note. If qualified business use was less than 15 days in a month, enter -0- Otherwise, use the lower of qualified business use area or Maximum area (300).	(ii) Area
a.	January		
b.	February		
c.	March		
d.	April		
e.	May		
f.	June		
g.	July		
h.	August		
i.	September		
j.	October		
k.	November		
l.	December		

m. Add lines 1a through 1l, column (ii)

n. Average monthly allowable square footage. Divide line 1m by 12. Enter the results on line 2 of the Simplified Method Worksheet.

Form **1040**

K-1 Reconciliation Worksheet - Sch E, B, D, Form 4797

2021

Name Ben F. Johnson | Taxpayer Identification Number [redacted]02

Entity Name Surety Bank | EIN 59-0580845 | Entity Type S Corporation | Screen K1 | K1 Unit 2

Activity | Passive Activity Type Other Passive | Entire disposition of activity

	Current Year Amount	PY Suspended Basis Loss	Disallowed Basis Limitation	PY Suspended At-risk Loss	Disallowed At-risk Limitation	PY Suspended Passive Loss	Disallowed Loss Limitation	Tax Return
Schedule E page 2								
Ordinary business income/-loss	4,266							
Net rental real estate income/-loss								
Other net rental income/-loss								
Guaranteed payments								
Section 179 expense								
Disallowed Section 179 expense								
Depletion								
Section 59(e)(2) expenditures								
Preproductive period expense								
Reforestation expense deduct								
Other deductions								
Unreimbursed expenses								
Other inc/loss - Schedule E								
Debt financed acquisition								
Dependent care benefits								
Total Schedule E page 2	4,266							4,266
Schedule E page 1								
Royalties								
Deductions-royalty income								
Depletion								
Total Schedule E page 1								
Schedule B								
Interest Income								
Tax-exempt interest income								
Dividend Income	6							6
Qualified dividends (1040, Page 2)								
Schedule D/8949/6781								
Short-term capital gain/-loss								
Long-term capital gain/-loss								
28% capital gain/-loss								
1256 contracts and straddles								
Form 4797								
4797 Part I	-3							-3
4797 Part II								
Section 179/280F recapture								

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Form **1040** | **K-1 Reconciliation Worksheet - Form 4684, Sch SE, Misc, Credits** | **2021**

Name Ben F. Johnson | Taxpayer Identification Number [redacted]2

Entity Name Surety Bank | EIN 59-0580845 | Entity Type S Corporation | Screen K1 | K1 Unit 2

Activity | Passive Activity Type Other Passive | Entire disposition of activity

	Current Year Amount	PY Suspended Basis Loss	Disallowed Basis Limitation	PY Suspended At-risk Loss	Disallowed At-risk Limitation	PY Suspended Passive Loss	Disallowed Loss Limitation	Tax Return
Form 4684								
Form 4684 lt loss trade/business								
Form 4684 lt loss income producing								
Form 4684 long-term gain								
Form 4684 st loss income producing								
Schedule SE								
Net earnings from self-employ								
Gross farming or fishing inc								
Gross nonfarm income								
Miscellaneous / Basis Worksheet								
Self-employed medical insurance								
Shareholder med ins not on Form W2								
Other tax-exempt income								
Nondeductible expenses								
Cash & market security distrib								
Property distributions	1,870							1,870
Repayment of shareholder loans								
Dependent care benefits (Form 2441)								
Credits								

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Form **1040** | **Passive Activity Deduction Worksheet** | **2021**

Name
Ben F. Johnson

Taxpayer Identification Number
[redacted]

Activity Residental Rental - [redacted]
Type Rental real estate w/active participation

Form Sch E Unit 1
Entire Disposition of Activity

Regular Tax Loss Calculations

	Prior Year Suspended Losses	Current Year Generated	Current Year Utilized	Suspended Losses To Next Year
Operating	58,247	3,300	4,263	57,284
Short-term capital loss				
Long-term capital loss				
28% rate capital loss				
Section 1231 loss				
Ordinary business loss				
Other Losses - 1040 Schedule 1				

Alternative Minimum Tax Loss Calculations

	Prior Year Suspended Losses	Current Year Generated	Current Year Utilized	Suspended Losses To Next Year
Operating	58,237	3,300	4,265	57,272
Short-term capital loss				
Long-term capital loss				
28% rate capital loss				
Section 1231 loss				
Ordinary business loss				
Other Losses - 1040 Schedule 1				

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Form **1040** | **Passive Activity Deduction Worksheet** | **2021**

Name: Ben F. Johnson

Taxpayer Identification Number: [redacted]

Activity: Surety Bank

Type: Other passive

Form: K1 Unit: 2

Entire Disposition of Activity

Regular Tax Loss Calculations

	Prior Year Suspended Losses	Current Year Generated	Current Year Utilized	Suspended Losses To Next Year
Operating				
Short-term capital loss				
Long-term capital loss				
28% rate capital loss				
Section 1231 loss		3	3	
Ordinary business loss				
Other Losses - 1040 Schedule 1				

Alternative Minimum Tax Loss Calculations

	Prior Year Suspended Losses	Current Year Generated	Current Year Utilized	Suspended Losses To Next Year
Operating				
Short-term capital loss				
Long-term capital loss				
28% rate capital loss				
Section 1231 loss		3	3	
Ordinary business loss				
Other Losses - 1040 Schedule 1				

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Form 1040	Passive Activity MAGI Calculation	2021

Name

Taxpayer Identification Number

Ben F. & [redacted] Johnson [redacted]

1	Adjusted gross income			1	397,173
2	Subtractions:				
2(a)	Passive activity income	2(a)	4,266		
2(b)	Taxable social security income	2(b)	27,866		
2(c)	Other	2(c)			
2(d)	Total subtractions			2(d)	32,132
3	Additions:				
3(a)	Allowed passive activity losses	3(a)	4,266		
3(b)	Rental real estate loss allowed to real estate professionals	3(b)			
3(c)	Overall loss from a PTP	3(c)			
3(d)	Taxpayer's IRA deduction	3(d)			
3(e)	Spouse's IRA deduction	3(e)			
3(f)	One-half self-employment tax	3(f)	1,869		
3(g)	Series EE & I Bond Interest	3(g)			
3(h)	Employer's adoption assistance program exclusion amount	3(h)			
3(i)	Student loan interest deduction	3(i)			
3(j)	Tuition and fees deduction	3(j)			
3(k)	Other and unemployment compensation exclusion	3(k)			
	Total additions			3(m)	6,135
4	Modified adjusted gross income			4	371,176

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Schedule C	Qualified Business Income Calculation Worksheet	2021

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

Principle business or profession: Hunt Club

Form/Schedule: C

Unit: 1

1.	Schedule C, Line 31, Net profit or (loss)	1.	26,454
	Additions for qualified business income:		
2.	Form 4797, Ordinary income	2.	
	Prior suspended losses utilized this year		
3.	Passive suspended losses	3.	
4.	At-Risk suspended losses	4.	
5.	Section 179 carryover	5.	
6.	Total additions to net profit or (loss). Add lines 2 through 5.	6.	
	Subtractions for qualified business income		
7.	Form 4797, Ordinary loss (includes share of Net section 1231 losses)	7.	
8.	Deductible portion of self-employment taxes	8.	1,869
9.	Self-employed SEP, SIMPLE, and qualified plans	9.	
10.	Self-employed health insurance deduction	10.	
11.	Reserved	11.	
12.	Reserved	12.	
13.	Total subtraction to net profit or (loss). Add lines 7 through 12.	13.	1,869
14.	Qualified business income for this activity. Line 1 plus line 6 less line 13.	14.	24,585

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Carryovers:	Beginning of Year Pre -2018 (A)	Beginning of Year After 2017 (B)	Allowed loss (C)	End of Year Pre -2018 (D)	End of Year After 2017 (E)	QBI Portion of Allowed Losses
Passive activity:						
Operating						
Form 4797, Part II						
Section 1231 loss						
At-Risk:						
Operating						
Form 4797, Part II						
Section 1231 loss						
Section 179						
Section 179 - COGS						
Other:						
Section 179						
Section 179 - COGS						

Amount to Form 8995, line 3 or Schedule C (Form 8995-A), line 2 qualified business loss carryforward

Schedule **E**

K-1 Reconciliation Worksheet - Qualified Business Income

2021

Name Ben F. Johnson | Taxpayer Identification Number [redacted]2

Entity Name Surety Bank | EIN 59-0580845 | Entity Type S Corporation | Screen K1 | K1 Unit 2

Activity | Passive Activity Type Other Passive | Entire disposition of activity

Qualified Business Income	Screen K1QBI Amount	QBI Items from Schedule K-1	Basis Limit Adjustment	At-risk Limit Adjustment	Passive Limitation	Qualified Business Income	Prior Year Suspended QBI Losses Allowed: Passive / 179	Basis	At-risk
Ordinary business inc/-loss	4,266	4,266				4,266			
Net rental real estate inc/-loss									
Other net rental income/-loss									
Royalties									
Section 1231 gain (loss)		-3				-3 *			
Section 179 expense									
Disallowed Section 179 exp									
Other income (loss)									
Other income/-loss Form 1040									
Reserved									
Other deductions									
4797 ordinary income / -loss									
Depletion									
UPE + Debt financed acquisit									
Deductible part of SE tax									
Self-employed health insurance									
Self-employed qualified plans									
Ordinary gains on distribution									
Total Qualified Business Income						4,263			

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CG not included 3

Form 8995 or 8995-A

Qualified business net (loss) carryforward from prior years
Form 8995, line 3 or Form 8995-A (Schedule C), line 2

Suspended Loss Carryforwards	Pre -TCJA Passive	Post- TCJA Passive	Pre -TCJA Basis	Post - TCJA Basis	Pre -TCJA At-Risk	Post- TCJA At-Risk	Other carryovers
Ordinary business loss							
Net rental real estate loss							
Other net rental loss							
Section 179 expense							
Depletion							
Section 59(e)(2) expenditure							
Preproductive period exp							
Reforestation expense ded							
Other deductions							
Other losses - Schedule E							
Dependent care expense							
4797 - Ordinary loss							
Other losses - 1040 Sch 1							
Section 1231 loss							

Form **1040** | **Rent and Royalty Reconciliation** | **2021**

Name [redacted]
Ben F. & [redacted] Johnson

Taxpayer identification number [redacted]

Property description
Residental Rental - [redacted]

Passive type: **Active participation**

Unit 1 Ownership Percentage
T, S, J T Business Use Percentage 100.00
State FL Personal Use Percentage

1. Physical address:
Street [redacted]
City, state, zip [redacted]
Property type: Single Family Residence

2. Property Use Information:
Fair Rental Days 365
Personal Use Days
QJV

	Column A	Column B	Column C	(Column A - B - C)
Income:	**Total Income/Expense**	**Nonbusiness Expenses**	**Vacation Home / Personal Use Expenses**	**Income / Expenses Reported on Schedule E**
3. Rents received	9,000			9,000
4. Royalties received				
Expenses:				
5. Advertising				
Auto				
Travel				
6. Auto and travel (total)				
7. Cleaning and maintenance				
8. Commissions				
9. Insurance	1,264			1,264
10. Legal and other professional fees	50			50
11. Management fees				
Mortgage interest from 1098				
Refinancing points on 1098				
12. Mortgage interest paid to banks, etc.				
Other mortgage interest				
Other interest				
Refinancing points				
Qualified mortgage insurance				
13. Other interest (total)				
14. Repairs	2,257			2,257
15. Supplies	1,894			1,894
Real estate taxes	1,490			
All other taxes				
16. Taxes (total)	1,490			1,490
17. Utilities				
18. Depreciation expense or depletion	5,250			5,250
19. Other (list)				
House Inspection	95			95
20. Total expenses. Add lines 5 through 19	12,300			12,300
21. Income or (loss) from rental or royalty properties.				-3,300

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Form 1040	Net Earnings from Self-Employment Worksheet	2021

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

	Taxpayer	Spouse
Farm profit or (loss)		
Schedule F		
Farm Partnerships - Schedule K-1, box 14, code A		
Auto expense from farm partnerships	( )	( )
Amortization from farm partnerships	( )	( )
Depreciation & Section 179 from farm partnerships	( )	( )
Depletion from farm partnerships	( )	( )
Other expenses from farm partnerships	( )	( )
Home office expenses from farm partnerships	( )	( )
Unreimbursed partnership expenses from farm partnerships	( )	( )
Debt financed acquisition interest from farm partnerships	( )	( )
Farm adjustment to SE Income		
Net farm profit or (loss) - Schedule SE line 1a	0	0
Conservation Reserve Program payments to social security/disability benefit recipients included on Sch F, ln 4b or listed on Sch K-1 (Form 1065), box 20, code AH- Sch SE line 1b	(0)	(0)
Nonfarm profit or (loss)		
Schedule C (excluding minister Schedule C income reported below)	26,454	
Nonfarm partnerships - Schedule K-1, box 14, code A		
Auto expense from nonfarm partnerships	( )	( )
Amortization from nonfarm partnerships	( )	( )
Depreciation & section 179 from nonfarm partnerships	( )	( )
Depletion from nonfarm partnerships	( )	( )
Other expenses from nonfarm partnerships	( )	( )
Home office expenses from nonfarm partnerships	( )	( )
Unreimbursed partnership expenses from nonfarm partnerships	( )	( )
Debt financed acquisition interest from nonfarm partnerships	( )	( )
Nonfarm adjustment to SE income		
Self-employment income reported as other income		
Self-employment income from contracts and straddles		
Minister/clergy self-employment income (from Clergy Worksheet Page 3, line 7)		
Net nonfarm profit or (loss) - Schedule SE line 2	26,454	0
Other income items subject to and/or exempt from self-employment tax		
Fees received for services performed as a notary public	( )	( )
Earnings while debtor in a chapter 11 bankruptcy case		
Taxable community property income/-loss		
Exempt community property income/-loss	( )	( )
Net adjustment included on Schedule SE, line 3	0	0
Net profit (loss) from self-employment activities - Schedule SE line 3	26,454	0
Church employee income - Schedule SE, Page 1 line 5a		

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Form **1040**	**Social Security Worksheet**	**2021**

Name: **Ben F. & [redacted] Johnson**

Taxpayer Identification Number: [redacted]

If you are married filing separately and you **lived apart** from your spouse for all of 2021:

- Form 1040/1040-SR: Enter "D" to the right of the word "benefits" on line 6a.

1.	Enter the total amount from **box 5** of **all** your **Forms SSA-1099** and **Forms RRB-1099** (if applicable). Also, enter this amount on Form 1040 or 1040-SR, line 6a.	1.	32,784
2.	Multiply line 1 by 50% (0.50)	2.	16,392
3.	Add the amounts on Form 1040 or 1040-SR, lines 1, 2a, 2b, 3b, 4b, 5b, 7, and Schedule 1, line 10. Also, enter the total of any exclusion/adjustments for Qualified U.S. savings bond interest (Form 8815, line 14), adoption benefits (Form 8839, line 29), foreign earned income or housing (Form 2555, lines 45 and 50), certain income of bona fide residents of American Samoa (Form 4563, line 15) or Puerto Rico	3.	371,176
4.	Add lines 2 and 3	4.	387,568
5.	Enter the total of the amounts from Form 1040 or 1040-SR, Schedule 1, lines 11 through 20, 23, and 25.	5.	1,869
6.	Subtract line 5 from line 4	6.	385,699
7.	Enter $25,000 ($32,000 if married filing jointly; $0 if married filing separately and you lived with your spouse at any time during 2021)	7.	32,000
8.	Subtract line 7 from line 6. If zero or less, enter -0-	8.	353,699
	• If line 8 is zero, stop here. None of your benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b. If you are married filing separately and you lived apart from your spouse for all of 2021, enter -0- on Form 1040 or 1040-SR, line 6b.		
	• If line 8 is more than zero, go to line 9.		
9.	Enter $9,000 ($12,000 if married filing jointly; $0 if married filing separately and you lived with your spouse at any time during 2021)	9.	12,000
10.	Subtract line 9 from line 8. If zero or less, enter -0-	10.	341,699
11.	Enter the smaller of line 8 or line 9	11.	12,000
12.	Enter one half of line 11	12.	6,000
13.	Enter the smaller of line 2 or line 12	13.	6,000
14.	Multiply line 10 by 85% (0.85). If line 10 is zero, enter -0-	14.	290,444
15.	Add lines 13 and 14	15.	296,444
16.	Multiply line 1 by 85% (0.85)	16.	27,866
17.	Taxable benefits. Enter the smaller of line 15 or line 16. Also, enter this amount on Form 1040 or 1040-SR, line 6b.	17.	27,866

Percentage of total benefits received included as taxable income. 85.0%

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Note: If part of your benefits are taxable for 2021 **and** they include benefits paid in 2021 that were for an earlier year, you may be able to reduce the taxable amount shown on the worksheet. See Pub. 915 for details.

Federal Statements

Form 1040, Dividend Income

[redacted]

Payer	Ordinary Dividends	Qualified Dividends	Section 199A Dividends
National Financial Services LLC (7025)	$ 13,643	$ 9,002	$ 99
Surety Bank	6		
Total	$ 13,649	$ 9,002	$ 99

Form 1040, Line 7 - Capital Gain Distributions

Payer	Capital Gain Distribution
National Financial Services LLC ([redacted])	$ 1,367
Total	$ 1,367

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Federal Statements

Hunt Club

Schedule C, Line 1 - Gross Receipts or Sales

Description	Amount
Income	$ 402,105
Total	$ 402,105

Hunt Club

Schedule C, Line 15 - Insurance (other than health)

Description	Amount
Insurance	$ 12,062
Total	$ 12,062

Hunt Club

Schedule C, Line 23 - Taxes and Licenses

Description	Amount
Taxes & Licenses	$ 244
Total	$ 244

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Federal Statements

Residental Rental - [redacted]

Schedule E, Line 3 - Rents Received

Description	Amount
Rental Income	$ 9,000
Total	$ 9,000

Residental Rental - [redacted]

Schedule E, Line 9 - Insurance

Description	Gross Amount	Business Use Percentage	Net Amount
Insurance (Rent, 1)	$ 1,264		$ 1,264
Total	$ 1,264		$ 1,264

Residental Rental - [redacted]

Schedule E, Line 10 - Legal and Other Professional Fees

Description	Gross Amount	Business Use Percentage	Net Amount
Legal & professional (Rent, 1)	$ 50		$ 50
Total	$ 50		$ 50

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Residental Rental - 2805 Grand Ave

Schedule E, Line 16 - Taxes

Description	Gross Amount	Business Use Percentage	Net Amount
Real estate taxes	$ 1,490		$ 1,490
Total	$ 1,490		$ 1,490

Federal Statements

Passive Income - OC

Form 1116 line 1a - Gross Income From Sources Within Country

Description	A	B	C
Foreign qualified dividends	$	$	$
Foreign qualified divs taxed at 15%		324	
x adjustment factor (0.4054)		131	
Foreign capital gains Wrk B	0	554	
Other foreign gross income			
1116 Foreign Gross Income		324	
- 1116 Foreign Qualified Dividends		324	
	0	0	
Total	0	685	

Passive Income - OC

Form 1116 line 3e - Gross Income from All Sources

Description	Amount
1040 ln 1/2b-5b Sch 1 ln 1/2a/7/8	$ 362,874
Gross Sch C business income	402,105
Gross Sch D capital gains	10,715
Gross Sch E rental income	9,000
Share PS/S-corp gross income	4,266
Total	$ 788,960

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Form 4797 - Adjustments to Part I Gains and Losses

From K1

Surety Bank	$ -3
Total	$ -3

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Schedule C (Form 8995-A), Line 5 - Allocation of Losses to Each Trade or Business

Trade or Business	Qualified Business Income	Ratio	Allocated QBI Loss
Surety Bank	$ 4,263	0.1478	$ 473
Farmton Hunt Club	24,585	0.8522	2,726
Total	$ 28,848	1.0000	$ 3,199

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Federal Statements

Form 8582, Passive Activity Income and Allowed Losses

Activity Name	Screen	Unit #	Current Year Net Income	Current Year Net Loss	Prior Year Unallowed Loss	Unallowed Loss	Allowed Loss	Form Location
Residental Rental - 2805 Grand Ave	E	1	$	$ 3,300	$ 58,247	$ 57,284	$ 4,263	Sch E Part I
Surety Bank	K-1	2	4,266					Sch E Part II
Surety Bank	K-1	2		3			3	4797 Part I
Total			$ 4,266	$ 3,303	$ 58,247	$ 57,284	$ 4,266	

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iHeartMedia + Entertainment Inc

Form W-2, Box 12

Description	Amount
Cost of group term life insurance coverage over 50,000	$ 523
Section 401(k) contributions	8,044
Cost of employer-sponsored health coverage	12,412
Total	$ 20,979

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County of Volusia

Form W-2, Box 12

Description	Amount
Cost of employer-sponsored health coverage	$ 8,122
Total	$ 8,122

County of Volusia

Form W-2, Box 14 - Other

Description	Amount
Medical insurance premiums	$ 1,946
Total	$ 1,946

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[redacted] Johnson, Ben F. & [redacted]

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Federal Asset Report

FYE: 12/31/2021

Hunt Club

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per	Conv	Meth	Prior	Current
Prior MACRS:												
2	GPS system for dogs	9/15/16	2,769			X	1,384	3	HY	200DB	2,769	0
3	Shed/Carport	8/03/16	2,739			X	1,370	7	HY	200DB	2,433	122
4	Roll Top Desk & Chair	8/13/17	628		X	X	0	7	HY	200DB	628	0
5	Beretta 686 Over/Under Shotgun	3/31/17	857		X	X	0	7	HY	200DB	857	0
6	Air Compressor 5HP 60gal 2 Cycle	11/02/17	692		X	X	0	7	HY	200DB	692	0
7	Home Office	1/01/17	140,000	7.72			10,808	39	MM	S/L	4,736	0
8	Trailer	2/21/18	9,651			X	0	5	HY	200DB	9,651	0
9	Office Furniture	4/23/18	550			X	0	7	HY	200DB	550	0
10	Browning Bar-Ser #[redacted]	12/11/18	850			X	0	7	HY	200DB	850	0
11	2019 Chevy Colorado Z71	9/09/19	36,868			X	0	5	HY	200DB	36,868	0
12	2 Scopes for gun	5/20/19	6,596			X	0	7	HY	200DB	6,596	0
13	2002 GMC Sonoma	10/04/19	4,823			X	0	5	HY	200DB	4,823	0
14	ATV * 5 yr warranty, 3 yr maint.	10/21/20	26,796			X	0	7	MQ	200DB	26,796	0
15	Office A/C Mitsubishi Mini Split	4/16/20	3,490			X	0	7	MQ	200DB	3,490	0
16	Polaris Ranger	1/24/20	5,000			X	0	7	MQ	200DB	5,000	0
17	Invisible Dog Fence	6/04/20	1,784			X	0	7	MQ	200DB	1,784	0
18	Dog Pen - Hounds	6/30/20	2,650			X	0	7	MQ	200DB	2,650	0
			246,743				13,562				111,173	122
Listed Property:												
1	Computer	5/30/16	1,337			X	668	5	HY	200DB	1,299	38
			1,337				668				1,299	38
	Grand Totals		248,080				14,230				112,472	160
	Less: Dispositions and Transfers		0				0				0	0
	Less: Start-up/Org Expense		0				0				0	0
	Net Grand Totals		248,080				14,230				112,472	160

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[redacted] Johnson, Ben F. & [redacted]
[redacted]

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Federal Asset Report

FYE: 12/31/2021

Residental Rental - 2805 Grand Ave

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per	Conv	Meth	Prior	Current
5-year GDS Property:												
10	Air Conditoner/Heater	6/30/21	5,250			X	0	5	HY	200DB	0	5,250
			5,250				0				0	5,250
Prior MACRS:												
1	Mower	7/01/93	1,083				1,083	7	HY	200DB	1,083	0
2	Drainfield	7/01/98	1,332				1,332	15	HY	150DB	1,332	0
3	Well	11/14/02	3,700			X	2,590	15	MQ	150DB	3,700	0
4	Generator	9/30/04	6,604				6,604	7	HY	200DB	6,604	0
5	Water Softener	6/30/04	2,551				2,551	7	HY	200DB	2,551	0
6	Sprinkler System	6/07/07	2,844				2,844	7	HY	200DB	2,844	0
7	Well Pump	7/19/07	1,600				1,600	7	HY	200DB	1,600	0
8	Fertilizer Spreader	3/25/13	356			X	178	7	HY	200DB	356	0
9	Well tank	4/18/13	750			X	375	7	HY	200DB	750	0
			20,820				19,157				20,820	0
	Grand Totals		26,070				19,157				20,820	5,250
	Less: Dispositions and Transfers		0				0				0	0
	Less: Start-up/Org Expense		0				0				0	0
	Net Grand Totals		26,070				19,157				20,820	5,250

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[redacted] Johnson, Ben F. & [redacted]
[redacted]

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Bonus Depreciation Report

FYE: 12/31/2021

Hunt Club

Asset	Property Description	Date In Service	Tax Cost	Bus Pct	Tax Sec 179 Exp	Current Bonus	Prior Bonus	Tax - Basis for Depr
1	Computer	5/30/16	1,337	100	0	0	669	668
2	GPS system for dogs	9/15/16	2,769		0	0	1,385	1,384
3	Shed/Carport	8/03/16	2,739		0	0	1,369	1,370
4	Roll Top Desk & Chair	8/13/17	628		628	0	0	0
5	Beretta 686 Over/Under Shotgun	3/31/17	857		857	0	0	0
6	Air Compressor 5HP 60gal 2 Cycle	11/02/17	692		692	0	0	0
8	Trailer	2/21/18	9,651		0	0	9,651	0
9	Office Furniture	4/23/18	550		0	0	550	0
10	Browning Bar-Ser #[redacted]	12/11/18	850		0	0	850	0
11	2019 Chevy Colorado Z71	9/09/19	36,868	100	0	0	36,868	0
12	2 Scopes for gun	5/20/19	6,596		0	0	6,596	0
13	2002 GMC Sonoma	10/04/19	4,823	100	0	0	4,823	0
14	ATV * 5 yr warranty, 3 yr maint.	10/21/20	26,796		0	0	26,796	0
15	Office A/C Mitsubishi Mini Split	4/16/20	3,490		0	0	3,490	0
16	Polaris Ranger	1/24/20	5,000		0	0	5,000	0
17	Invisible Dog Fence	6/04/20	1,784		0	0	1,784	0
18	Dog Pen - Hounds	6/30/20	2,650		0	0	2,650	0
	Grand Total		108,080		0	0	102,481	3,422

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[redacted]

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Bonus Depreciation Report

FYE: 12/31/2021

Residental Rental - 2805 Grand Ave

Asset	Property Description	Date In Service	Tax Cost	Bus Pct	Tax Sec 179 Exp	Current Bonus	Prior Bonus	Tax - Basis for Depr
3	Well	11/14/02	3,700		0	0	1,110	2,590
8	Fertilizer Spreader	3/25/13	356		0	0	178	178
9	Well tank	4/18/13	750		0	0	375	375
10	Air Conditoner/Heater	6/30/21	5,250		0	5,250	0	0
	Grand Total		10,056		0	5,250	1,663	3,143

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FYE: 12/31/2021

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AMT Asset Report
Hunt Club

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per	Conv	Meth	Prior	Current
Prior MACRS:												
2	GPS system for dogs	9/15/16	2,769			X	1,384	3	HY	200DB	2,769	0
3	Shed/Carport	8/03/16	2,739			X	1,370	7	HY	200DB	2,433	122
4	Roll Top Desk & Chair	8/13/17	628		X	X	0	7	HY	200DB	628	0
5	Beretta 686 Over/Under Shotgun	3/31/17	857		X	X	0	7	HY	200DB	857	0
6	Air Compressor 5HP 60gal 2 Cycle	11/02/17	692		X	X	0	7	HY	200DB	692	0
7	Home Office	1/01/17	140,000	7.72			10,808	39	MM	S/L	4,736	0
8	Trailer	2/21/18	9,651			X	0	5	HY	200DB	9,651	0
9	Office Furniture	4/23/18	550			X	0	7	HY	200DB	550	0
10	Browning Bar-Ser #[redacted]	12/11/18	850			X	0	7	HY	200DB	850	0
11	2019 Chevy Colorado Z71	9/09/19	36,868			X	0	5	HY	200DB	36,868	0
12	2 Scopes for gun	5/20/19	6,596			X	0	7	HY	200DB	6,596	0
13	2002 GMC Sonoma	10/04/19	4,823			X	0	5	HY	200DB	4,823	0
14	ATV * 5 yr warranty, 3 yr maint.	10/21/20	26,796			X	0	7	MQ	200DB	26,796	0
15	Office A/C Mitsubishi Mini Split	4/16/20	3,490			X	0	7	MQ	200DB	3,490	0
16	Polaris Ranger	1/24/20	5,000			X	0	7	MQ	200DB	5,000	0
17	Invisible Dog Fence	6/04/20	1,784			X	0	7	MQ	200DB	1,784	0
18	Dog Pen - Hounds	6/30/20	2,650			X	0	7	MQ	200DB	2,650	0
			246,743				13,562				111,173	122
Listed Property:												
1	Computer	5/30/16	1,337			X	668	5	HY	200DB	1,299	38
			1,337				668				1,299	38
Grand Totals			248,080				14,230				112,472	160
Less: Dispositions and Transfers			0				0				0	0
Net Grand Totals			248,080				14,230				112,472	160

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AMT Asset Report

FYE: 12/31/2021

Residental Rental - 2805 Grand Ave

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per	Conv	Meth	Prior	Current
5-year GDS Property:												
10	Air Conditoner/Heater	6/30/21	5,250			X	0	5	HY	200DB	0	5,250
			5,250				0				0	5,250
Prior MACRS:												
1	Mower	7/01/93	1,083				1,083	10	HY	150DB	1,083	0
2	Drainfield	7/01/98	1,332				1,332	20	HY	150DB	1,332	0
3	Well	11/14/02	3,700			X	2,590	15	MQ	150DB	3,700	0
4	Generator	9/30/04	6,604				6,604	7	HY	150DB	6,604	0
5	Water Softener	6/30/04	2,551				2,551	7	HY	150DB	2,551	0
6	Sprinkler System	6/07/07	2,844				2,844	7	HY	150DB	2,844	0
7	Well Pump	7/19/07	1,600				1,600	7	HY	150DB	1,600	0
8	Fertilizer Spreader	3/25/13	356			X	178	7	HY	200DB	356	0
9	Well tank	4/18/13	750			X	375	7	HY	200DB	750	0
			20,820				19,157				20,820	0
	Grand Totals		26,070				19,157				20,820	5,250
	Less: Dispositions and Transfers		0				0				0	0
	Net Grand Totals		26,070				19,157				20,820	5,250

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Depreciation Adjustment Report

FYE: 12/31/2021

All Business Activities

Form	Unit	Asset	Description	Tax	AMT	AMT Adjustments/ Preferences
MACRS Adjustments:						
C	1	1	Computer	38	38	0
C	1	2	GPS system for dogs	0	0	0
C	1	3	Shed/Carport	122	122	0
C	1	4	Roll Top Desk & Chair	0	0	0
C	1	5	Beretta 686 Over/Under Shotgun	0	0	0
C	1	6	Air Compressor 5HP 60gal 2 Cycle	0	0	0
C	1	7	Home Office	0	0	0
C	1	8	Trailer	0	0	0
C	1	9	Office Furniture	0	0	0
C	1	10	Browning Bar-Ser #[redacted]	0	0	0
C	1	11	2019 Chevy Colorado Z71	0	0	0
C	1	12	2 Scopes for gun	0	0	0
C	1	13	2002 GMC Sonoma	0	0	0
C	1	14	ATV * 5 yr warranty, 3 yr maint.	0	0	0
C	1	15	Office A/C Mitsubishi Mini Split	0	0	0
C	1	16	Polaris Ranger	0	0	0
C	1	17	Invisible Dog Fence	0	0	0
C	1	18	Dog Pen - Hounds	0	0	0
E	1	1	Mower	0	0	0
E	1	2	Drainfield	0	0	0
E	1	3	Well	0	0	0
E	1	4	Generator	0	0	0
E	1	5	Water Softener	0	0	0
E	1	6	Sprinkler System	0	0	0
E	1	7	Well Pump	0	0	0
E	1	8	Fertilizer Spreader	0	0	0
E	1	9	Well tank	0	0	0
E	1	10	Air Conditoner/Heater	5,250	5,250	0
				5,410	5,410	0

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Future Depreciation Report FYE: 12/31/22

FYE: 12/31/2021

Hunt Club

Asset	Description	Date In Service	Cost	Tax	AMT
Prior MACRS:					
2	GPS system for dogs	9/15/16	2,769	0	0
3	Shed/Carport	8/03/16	2,739	123	123
4	Roll Top Desk & Chair	8/13/17	628	0	0
5	Beretta 686 Over/Under Shotgun	3/31/17	857	0	0
6	Air Compressor 5HP 60gal 2 Cycle	11/02/17	692	0	0
7	Home Office	1/01/17	140,000	0	0
8	Trailer	2/21/18	9,651	0	0
9	Office Furniture	4/23/18	550	0	0
10	Browning Bar-Ser #[redacted]	12/11/18	850	0	0
11	2019 Chevy Colorado Z71	9/09/19	36,868	0	0
12	2 Scopes for gun	5/20/19	6,596	0	0
13	2002 GMC Sonoma	10/04/19	4,823	0	0
14	ATV * 5 yr warranty, 3 yr maint.	10/21/20	26,796	0	0
15	Office A/C Mitsubishi Mini Split	4/16/20	3,490	0	0
16	Polaris Ranger	1/24/20	5,000	0	0
17	Invisible Dog Fence	6/04/20	1,784	0	0
18	Dog Pen - Hounds	6/30/20	2,650	0	0
			246,743	123	123
Listed Property:					
1	Computer	5/30/16	1,337	0	0
			1,337	0	0
	Grand Totals		248,080	123	123

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Future Depreciation Report FYE: 12/31/22

FYE: 12/31/2021

Residental Rental - 2805 Grand Ave

Asset	Description	Date In Service	Cost	Tax	AMT
Prior MACRS:					
1	Mower	7/01/93	1,083	0	0
2	Drainfield	7/01/98	1,332	0	0
3	Well	11/14/02	3,700	0	0
4	Generator	9/30/04	6,604	0	0
5	Water Softener	6/30/04	2,551	0	0
6	Sprinkler System	6/07/07	2,844	0	0
7	Well Pump	7/19/07	1,600	0	0
8	Fertilizer Spreader	3/25/13	356	0	0
9	Well tank	4/18/13	750	0	0
10	Air Conditoner/Heater	6/30/21	5,250	0	0
			26,070	0	0
	Grand Totals		26,070	0	0

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Form 1040 | **Carryover Report** | 2021

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

Carryover Item	Available to 2021	2021 Amounts		Carryover to 2022
Minimum tax credit				
Investment interest				
Investment interest - AMT				
Short-term capital loss				
Short-term capital loss - AMT				
Long-term capital loss				
Long-term capital loss - AMT				
Residential energy efficient property				
D.C. first-time homebuyer credit				
Tax credit bonds				
Qualified business income loss	3,199	Utilized	-3,199	0
Qualified REIT income and PTP loss				

Nonrecaptured Section 1231 Losses - Line 8, Form 4797

2016 Amounts		
2017 Amounts		
2018 Amounts		
2019 Amounts		
2020 Amounts		
Available to 2021		
2021 Amounts	Generated	3
Carryover to 2022		3

AMT Nonrecaptured Section 1231 Losses - Line 8, Form 4797

2016 Amounts		
2017 Amounts		
2018 Amounts		
2019 Amounts		
2020 Amounts		
Available to 2021		
2021 Amounts	Generated	3
Carryover to 2022		3

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Form **1040** | **Pension/Annuity Report** | **2021**

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

	T/S	Payer	Gross Distribution	Rollover	Taxable Amount
A	T	Florida Retirement System	75,529		75,443
B	T	Florida Retirement System	79,242		79,242
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					
M					
N					
O					
		Taxpayer	154,771		154,685
		Spouse			
		Total	154,771		154,685

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	NIIT	Capital Gain Distribution	Public Safety Officer Exclusion	Federal Withholding	State Withholding	Local Withholding
A				13,772		
B				25,647		
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
Taxpayer				39,419		
Spouse						
Total				39,419		

Form **1040** | **Salaries & Wages Report** | **2021**

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

	T/S	Employer	Federal Wages	Federal Withheld	Soc Sec Wages
A	S	iHeartMedia + Entertainment Inc	121,171	22,321	129,216
B	T	County of Volusia	45,390	25,925	45,390
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					
M					
Taxpayer			45,390	25,925	45,390
Spouse			121,171	22,321	129,216
Totals			166,561	48,246	174,606

	Soc Sec Withheld	Medicare Wages	Medicare Withheld	Soc Sec Tips	Allocated Tips	Dep Care Ben	Other, Box 14
A	8,011	129,216	1,874				
B	2,814	45,390	658				1,946
C							
D							
E							
F							
G							
H							
I							
J							
K							
L							
M							
Taxpayer	2,814	45,390	658				1,946
Spouse	8,011	129,216	1,874				
Totals	10,825	174,606	2,532				1,946

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	State	State Wages	State Withheld	Name of Locality	Local Wages	Local Withheld
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
Taxpayer						
Spouse						
Totals						

Form **1040** | **Withholding (WH) Summary Report** | **2021**

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

T/S	Description	Form	Federal WH	State WH	Local WH
S	iHeartMedia + Entertainment Inc	W-2	22,321		
T	County of Volusia	W-2	25,925		
T	Florida Retirement System	1099	13,772		
T	Florida Retirement System	1099	25,647		

Form **1040** | **Two Year Comparison Report - Page 1** | **2020 & 2021**

Name: **Ben F. & [redacted] Johnson**

Taxpayer Identification Number: [redacted]

			2020	2021	Differences
	Filing Status		MFJ	MFJ	
	Dependents		0	0	
Income	1. Salaries and wages	1.	146,077	166,561	20,484
	2. Interest income	2.	276	113	-163
	3. Tax exempt interest income	3.			
	4. Dividend income	4.	14,479	13,649	-830
	5. Qualified dividend income	5.	9,117	9,002	-115
	6. Taxable state/local refunds	6.			
	7. Alimony received	7.			
	8. Business income/loss	8.		26,454	26,454
	9. Capital gain/loss	9.	8,806	9,714	908
	10. Other gains/losses	10.		-3	-3
	11. Taxable IRA distributions	11.			
	12. Taxable pensions	12.	151,004	154,685	3,681
	13. Rent and royalty income including farm rental	13.	-3,122	-4,263	-1,141
	14. Partnership/S corp income	14.	3,017	4,266	1,249
	15. Estate or trust income	15.			
	16. Farm income/loss	16.			
	17. Unemployment compensation	17.			
	18. Taxable social security	18.	27,509	27,866	357
	19. Other income	19.			
	20. **Total income**	20.	347,046	397,042	50,996
Adjustments	21. Moving expenses	21.			
	22. Deductible part of self-employment	22.		1,869	1,869
	23. SEP/SIMPLE/Qualified plans deductions	23.			
	24. SE health insurance	24.			
	25. Penalty on early withdrawal of savings	25.			
	26. Alimony paid	26.			
	27. IRA deductions	27.			
	28. Student loan interest	28.			
	29. Other adjustments	29.	300		-300
	30. **Adjusted gross income**	30.	347,746	397,173	49,427
Deductions	31. Medical	31.			
	32. Taxes	32.	3,906	1,867	-2,039
	33. Interest	33.			
	34. Contributions	34.	3,250	4,600	1,350
	35. Casualty losses	35.			
	36. Miscellaneous expenses	36.			
	37. **Allowable itemized deductions**	37.	7,156	6,467	-689
	38. Standard deduction (incl charitable contrib w/std ded)	38.	26,100	27,050	950
	39. Deduction taken	39.	Standard 26,100	Standard 27,050	950
	40. Taxable income before Qual Bus Inc Ded (QBID)	40.	321,646	370,123	48,477
	41. QBID	41.	25	4,585	4,560
	42. **Taxable income**	42.	321,621	365,538	43,917

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Form **1040** | **Two Year Comparison Report - Page 2** | **2020 & 2021**

Name: Ben F. & [redacted]e Johnson

Taxpayer Identification Number: [redacted]

			2020	2021	Differences
	43. Taxable income from 2YR page 1, line 42	43.	321,621	365,538	43,917
	44. Tax on taxable income	44.	63,735	75,444	11,709
	45. Alternative minimum tax	45.			
	46. Excess advance premium tax credit	46.			
	47. Child care credit	47.			
	48. Education credits	48.			
T	49. Retirement savings credit	49.			
a	50. Child & other dependent tax credit	50.			
x	51. General business credit	51.			
	52. Other credits	52.	35	50	15
C	53. **Total credits**	53.	35	50	15
o	54. **Net tax liability**	54.	63,700	75,394	11,694
m	55. Self-employment taxes	55.		3,737	3,737
p	56. Other taxes	56.	891	892	1
u	57. **Total tax**	57.	64,591	80,023	15,432
t	58. Income tax withheld	58.	82,780	87,665	4,885
a	59. Estimated tax payments	59.			
t	60. Earned income credit	60.			
i	61. Additional Child tax credit	61.			
o	62. Other refundable tax credits	62.			
n	63. Other payments	63.			
	64. **Total payments**	64.	82,780	87,665	4,885
	65. **Tax due/-refund**	65.	-18,189	-7,642	10,547
	66. Penalties and interest	66.			
	67. **Net tax due/-refund**	67.	-18,189	-7,642	10,547
	68. Refund applied to estimated tax payments	68.			
	69. Refund received	69.	-18,189	-7,642	10,547
	70. **Effective tax rate**	70.	20.0 %	22.0 %	

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Two Year Comparison - Tax Reconciliation Marginal Tax Rates

	2020 Taxable Income	2020 Marginal Tax Rate	2021 Taxable Income	2021 Marginal Tax Rate
Ordinary income	303,698	24.0%	346,822	32.0%
Capital income	17,923	15.0%	18,716	15.0%
Capital - Sec. 1250		%		%
Capital - Sec. 1202		%		%

Form 1040	Two Year Comparison Report - Schedule C	2020 & 2021

Name
Ben F. Johnson

Taxpayer identification number
[redacted]

Principal business or profession
Hunt Club

Unit
1

Income		2020	2021	Differences
1. Gross receipts or sales	1.	405,138	402,105	-3,033
2. Returns and allowances	2.			
3. **Cost of goods sold**	3.			
4. **Gross profit**	4.	405,138	402,105	-3,033
5. Other income	5.			
6. **Gross income**	6.	405,138	402,105	-3,033
Expenses				
7. Advertising	7.	1,605	779	-826
8. Car and truck expenses	8.		16,001	16,001
9. Commissions and fees	9.			
10. Contract labor	10.			
11. Depletion	11.			
12. Depreciation and section 179 expense deduction	12.	39,919	160	-39,759
13. Employee benefit programs	13.			
14. Insurance (other than health)	14.	11,525	12,062	537
15. Interest - mortgage (paid to banks, etc.)	15.			
16. Interest - other	16.			
17. Legal and professional services	17.	905	879	-26
18. Office expense	18.	583	1,932	1,349
19. Pension and profit-sharing plans	19.			
20. Rent or lease - vehicles, machinery and equipment	20.			
21. Rent or lease - other business property	21.	327,486	324,472	-3,014
22. Repairs and maintenance	22.	1,017	3,783	2,766
23. Supplies (not included in cost of goods sold)	23.		4,729	4,729
24. Taxes and licenses	24.	1,096	244	-852
25. Travel	25.	219	2,500	2,281
26. Total meals and entertainment	26.	1,052	869	-183
26a. Nondeductible meals and entertainment	26a.	526		-526
26b. Deductible meals and entertainment	26b.	526	869	343
27. Utilities	27.	187	172	-15
28. Wages (less employment credits)	28.			
29. Other expenses	29.	17,731	6,069	-11,662
30. **Total expenses**	30.	402,799	374,651	-28,148
Profit/ (loss)				
31. Tentative profit (loss)	31.	2,339	27,454	25,115
32. Expenses for business use of home	32.	2,339	1,000	-1,339
33. **Net profit or (loss)**	33.		26,454	26,454
Cost of Goods Sold				
34. Inventory - Beginning of year	34.			
35. Purchases	35.			
36. Labor	36.			
37. Materials	37.			
38. Other costs	38.			
39. **Goods available for sale (sum of lines 34-38)**	39.			
40. Inventory - End of year	40.			

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Form 1040	Two Year Comparison Report - Schedule E Page 1	2020 & 2021

Name: Ben F. Johnson

Taxpayer identification number: [redacted]

Property description: Residental Rental - [redacted]

Unit: 1

		2020	2021	Differences
Income				
1. Total rents and royalties received	1.	9,000	9,000	
Expenses				
2. Advertising	2.			
3. Auto and travel	3.			
4. Cleaning and maintenance	4.	771		-771
5. Commissions	5.			
6. Insurance	6.	878	1,264	386
7. Legal and other professional fees	7.	50	50	
8. Management fees	8.			
9. Mortgage interest paid to banks, etc.	9.			
10. Other interest	10.			
11. Repairs	11.	1,706	2,257	551
12. Supplies	12.	3,183	1,894	-1,289
13. Taxes	13.	1,406	1,490	84
14. Utilities	14.			
15. Depreciation expense or depletion	15.	25	5,250	5,225
16. Other expenses	16.	6,378	95	-6,283
17. **Total expenses**	17.	14,397	12,300	-2,097
Profit/(loss)				
18. **Income or (loss) from rental real estate or royalty properties**	18.	-5,397	-3,300	2,097
19. Deductible rental real estate loss	19.	-3,122	-4,263	-1,141
Carryover				
20. Vacation home operating expenses carryover to next year	20.			
21. Vacation home excess casualty & depreciation carryover to next yr	21.			

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Form **1040** | **Tax Return History Report - Page 1** | **2021**

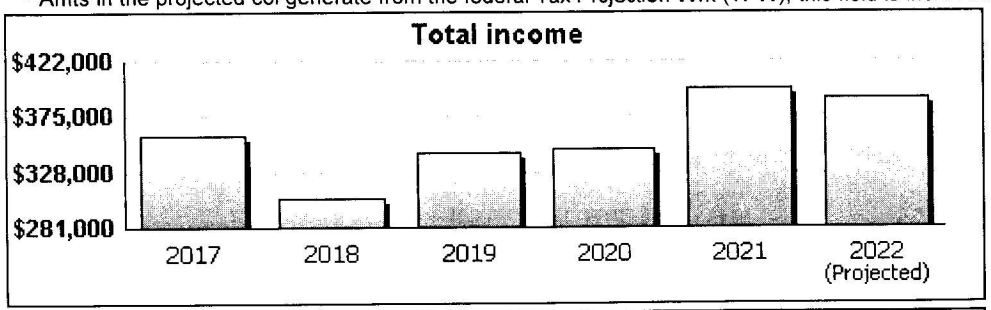
Name **Ben F. & [redacted] Johnson** | Taxpayer Identification Number [redacted]

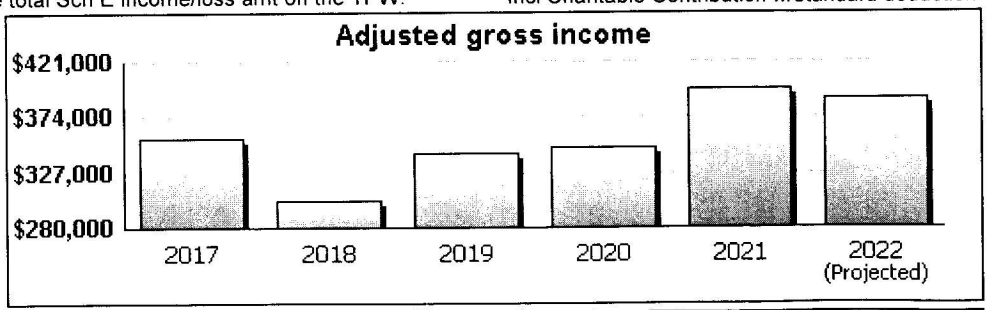
	2017	2018	2019	2020	2021	2022 Projected
Filing Status	MFJ	MFJ	MFJ	MFJ	MFJ	MFJ
Salaries and wages	159,697	125,207	147,475	146,077	166,561	166,561
Interest income	214	237	269	276	113	113
Dividend income	14,824	15,465	14,662	14,479	13,649	13,649
Business income/loss	19,793	22,305	-7,779		26,454	26,454
Capital gains/losses	-3,000	-3,000	14,504	8,806	9,714	
Other gains/losses					-3	
IRA distributions, pensions, annuities	140,859	143,918	147,416	151,004	154,685	154,685
Rent, royalty, farm rental income		-25,266	-1,357	-3,122	-4,263	3
Partnership/S corp income			1,357	3,017	4,266	*
Estate or trust income						*
Farm income/loss						
Other income/loss	26,004	26,336	27,081	27,509	27,866	29,510
Total income	358,391	305,202	343,628	348,046	399,042	390,975
Total adjustments	1,399	1,576		300	1,869	1,869
Adjusted gross income	356,992	[illegible]	343,628	[illegible]	397,173	389,106
Allowable itemized deductions	4,968	[illegible]	[illegible]	[illegible]	6,467	6,467
Standard deduction	13,950	[illegible]	[illegible]	26,100 **	27,050 **	27,300 **
Itemized or standard deduction taken	13,950	25,300	25,700	26,100	27,050	27,300
Exemptions	7,776					
Taxable income before Qual Bus Inc Ded	335,266	278,326	317,928	321,646	370,123	361,806
Qual Bus Inc Ded		4,442	48	25	4,585	
Taxable income	335,266	273,884	317,880	321,621	365,538	361,806

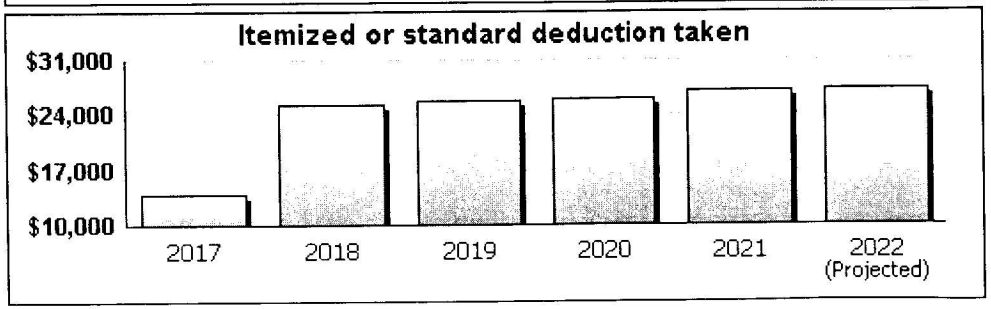
CLIENT COPY

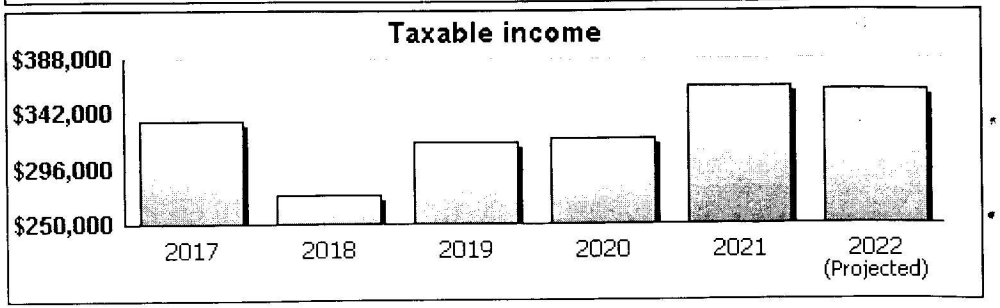
* Amts in the projected col generate from the federal Tax Projection Wrk (TPW); this field is incl in the total Sch E income/loss amt on the TPW.

** Incl Charitable Contribution w/standard deduction.









Form **1040**

Tax Return History Report - Page 2

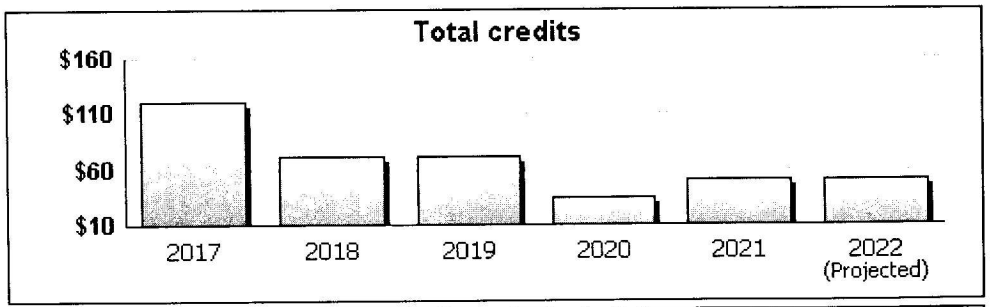
2021

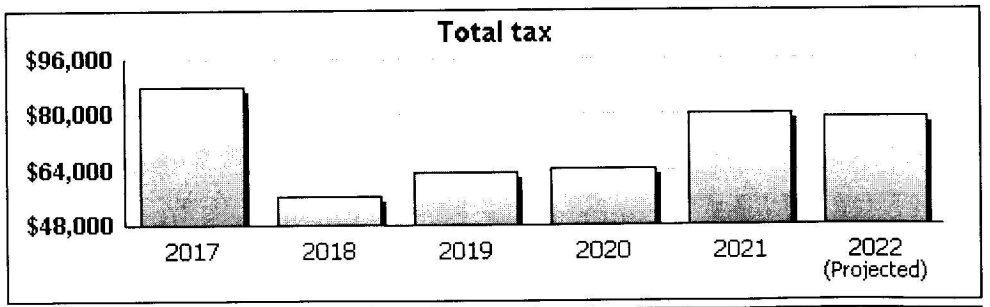
Name **Ben F. & [redacted] Johnson**

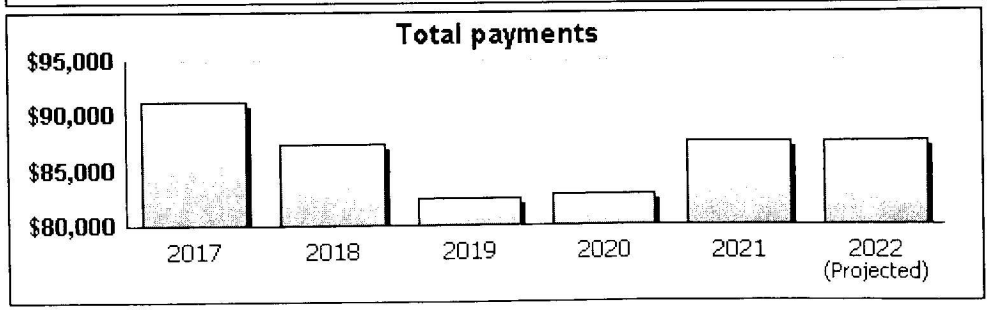
Taxpayer Identification Number [redacted]

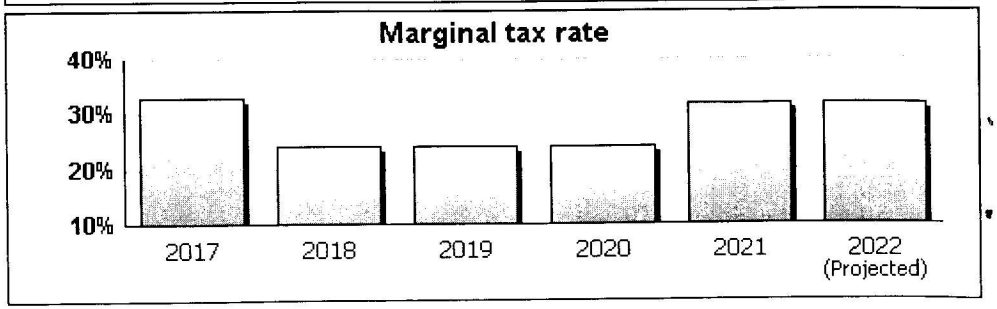
	2017	2018	2019	2020	2021	2022 Projected
Taxable income	335,266	273,884	317,880	321,621	365,538	361,806
Tax on taxable income and Form 8962	84,029	53,306	62,393	63,735	75,444	74,710
Alternative minimum tax	921					
Total credits	121	72	72	35	50	50
Net tax liability	84,829	53,234	62,321	63,700	75,394	74,660
Self-employment taxes	2,797	3,152			3,737	3,737
Other taxes	476		1,119	891	892	523
Total tax	88,102	56,386	63,440	64,591	80,023	78,920
Income tax withheld	72,170	62,763	82,413	82,780	87,665	87,665
Estimated tax payments	19,046	24,721				
Other payments						
Total payments	91,216	87,484	82,413	82,780	87,665	87,665
Total due/-refund	-3,114	-31,098	-18,973	-18,189	-7,642	-8,745
Penalties and interest						
Net tax due/-refund	-3,114	-31,098	-18,973	-18,189	-7,642	-8,745
Refund applied to estimated tax payments	3,11[redacted]					
Refund received		[redacted]	-18,973	-18,189	-7,642	
Marginal tax rate	33.0%	24.0%	24.0%	24.0%	32.0%	32.0%
Effective tax rate	26.0%	21.0%	20.0%	20.0%	22.0%	22.0%

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Form 1040 | Reconciliation Worksheet - Taxable Income & Tax | 2021

Name: Ben F. & [redacted] Johnson

Taxpayer Identification Number: [redacted]

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

Filing Status Married filing jointly **Tax Pct** Total Tax (ln 27) divided Total Taxable Income (ln 19) 21.0%

Tax Method Qualified Dividends & Capital Gain Tax Worksheet

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

Tax using capital gains rates | Tax using Ordinary rates | Tax savings

	Taxable Amount	Marginal Tax Rate	Tax on Taxable Income	Marginal Tax Rate - Income Range	Amount of Income to Next Tax Bracket
Ordinary Income	346,822	32.0%	72,637	$329,850 - $418,850	72,028
Capital Income	18,716	15.0%	2,807	$81,050 - $628,300	609,584
Capital Income - 1250		%			
Capital Income - 1202		%			

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

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Income taxed at ordinary rates		(a) Taxable Income		(b) Tax*
1. 10% rate	Maximum taxable income per this bracket: $19,900	1a. 19,900	1b.	1,993
2. 12% rate	Maximum taxable income per this bracket: $61,650	2a. [illegible]	2b.	7,341
3. 22% rate	Maximum taxable income per this bracket: $91,700	3a. 91,700	3b.	20,168
4. 24% rate	Maximum taxable income per this bracket: $157,100	4a. 157,100	4b.	37,704
5. 32% rate	Maximum taxable income per this bracket: $89,000	5a. 16,972	5b.	5,431
6. 35% rate		6a.	6b.	
7. 37% rate		7a.	7b.	
8. **Total ordinary taxable income and ordinary tax.** Add lines 1 through 7		8a. 346,822	8b.	72,637

Income taxed at capital gains rates				
9. 0% capital gains rate		9a.	9b.	
10. 15% capital gains rate	Maximum taxable income per this bracket: $420,800	10a. 18,716	10b.	2,807
11. 20% capital gains rate		11a.	11b.	
12. 25% capital gains rate	Unrecaptured Section 1250 Gain	12a.	12b.	
13. 28% capital gains rate	Small business stock, collectibles	13a.	13b.	
14. **Total taxable capital gains and capital gains tax.** Add lines 9 through 13		14a. 18,716	14b.	2,807

Total taxable income		
15. Total ordinary taxable income. Enter the amount from line 8a.	15.	346,822
16. Total capital gains taxable income. Enter the amount from line 14a.	16.	18,716
17. Add lines 15 and 16.	17.	365,538
18. Enter the net foreign exclusion amount from the Foreign Earned Income Tax Worksheet, line 2c.	18.	
19. **Taxable income** reported on 1040, line 11b, (1040NR, line 41, or 1040NR-EZ, line 14). Subtract line 18 from line 17.	19.	365,538

Total tax		
20. Total ordinary tax. Enter the amount from line 8b.	20.	72,637
21. Total capital gains tax. Enter the amount from line 14b.	21.	2,807
22. Tax on child's interest and dividend.	22.	
23. Tax on lump-sum distribution.	23.	
24. Other taxes.	24.	
25. Add lines 20 through 24.	25.	75,444
26. Enter the tax allocated to the net exclusion amount from the Foreign Earned Income Tax Worksheet, line 5.	26.	
27. **Total tax** reported on 1040, line 12b, (1040NR, line 42, or 1040NR-EZ, line 15). Subtract line 26 from line 25.	27.	75,444

a Employee's soc. sec. no. [redacted] | b Employer identification number (EIN) [redacted]

Copy B To Be Filed With Employee's FEDERAL Tax Return | OMB No. 1545-0008

c Employer's name, address, and ZIP code

COUNTY OF VOLUSIA, FLORIDA
123 W. INDIANA AVE
DELAND FL 32720

1 Wages, tips, other compensation: 45390.04	2 Federal income tax withheld: 25925.14
3 Social security wages: 45390.04	4 Social security tax withheld: 2814.18
5 Medicare wages and tips: 45390.04	6 Medicare tax withheld: 658.16
7 Social security tips: 0.00	8 Allocated tips: 0.00
10 Dependent care benefits: 0.00	11 Nonqualified plans: 0.00
12b Code	12c Code

d Control number: 4

e Employee's name, address, and ZIP code — Suff.

[redacted]
BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722

9	
12a Code: DD	8122.14
12d Code	
13 Statutory employee	
Retirement plan: X	
Third-party sick pay	
14 Other: HEALTH INS 1945.84	

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
		0.00	0.00	0.00	0.00	
		0.00	0.00	0.00	0.00	

Form W-2 WAGE and TAX STATEMENT 2021 — Department of the Treasury - Internal Revenue Service

This information is being furnished to the Internal Revenue Service. *www.irs.gov/efile*

---

a Employee's soc. sec. no. [redacted] | b Employer identification number (EIN) [redacted]

Copy 2 To Be Filed With Employee's State, City, or Local Tax Return | OMB No. 1545-0008

c Employer's name, address, and ZIP code

COUNTY OF VOLUSIA, FLORIDA
123 W. INDIANA AVE
DELAND FL 32720

1 Wages, tips, other compensation: 45390.04	2 Federal income tax withheld: 25925.14
3 Social security wages: 45390.04	4 Social security tax withheld: 2814.18
5 Medicare wages and tips: 45390.04	6 Medicare tax withheld: 658.16
7 Social security tips: 0.00	8 Allocated tips: 0.00
10 Dependent care benefits: 0.00	11 Nonqualified plans: 0.00
12b Code	12c Code

d Control number: 4

e Employee's name, address, and ZIP code — Suff.

[redacted]
BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722

9	
12a Code: DD	8122.14
12d Code	
13 Statutory employee	
Retirement plan: X	
Third-party sick pay	
14 Other: HEALTH INS 1945.84	

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
		0.00	0.00	0.00	0.00	
		0.00	0.00	0.00	0.00	

Form W-2 WAGE and TAX STATEMENT 2021 — Department of the Treasury - Internal Revenue Service

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a Employee's soc. sec. no. [redacted] | b Employer identification number (EIN) [redacted]

Copy C For Employee's Records (See Notice on Back of Copy "B") | OMB No. 1545-0008

This information is being furnished to the IRS. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

c Employer's name, address, and ZIP code

COUNTY OF VOLUSIA, FLORIDA
123 W. INDIANA AVE
DELAND FL 32720

1 Wages, tips, other compensation: 45390.04	2 Federal income tax withheld: 25925.14
3 Social security wages: 45390.04	4 Social security tax withheld: 2814.18
5 Medicare wages and tips: 45390.04	6 Medicare tax withheld: 658.16
7 Social security tips: 0.00	8 Allocated tips: 0.00
10 Dependent care benefits: 0.00	11 Nonqualified plans: 0.00
12b Code	12c Code

d Control number: 4

e Employee's name, address, and ZIP code — Suff.

[redacted]
BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722

9	
12a Code: DD	8122.14
12d Code	
13 Statutory employee	
Retirement plan: X	
Third-party sick pay	
14 Other: HEALTH INS 1945.84	

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
		0.00	0.00	0.00	0.00	
		0.00	0.00	0.00	0.00	

Form W-2 WAGE and TAX STATEMENT 2021 L3UP 5210 — Department of the Treasury - Internal Revenue Service

(4)

MAINSTREET COMMUNITY BANK OF FLORID
204 S. WOODLAND BLVD.
DELAND FL 32720
(386) 734-5930

PAYER'S
TIN
20-0235207

OMB No. 1545-0112
Interest Income
Form 1099-INT
Copy B
For Recipient
For year 2021

BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722

RECIPIENT'S
TIN
[redacted]

Account number	Interest Income	Interest on U.S. Bonds & Treas	Federal Tax Withheld
[redacted]	3.08		
	108.77		

BOX 1 Interest income.	111.85
BOX 2 Early withdrawal penalty	
BOX 3 Interest on U.S. Savings Bonds and Treas. obligations	
BOX 4 Federal income tax withheld.	
BOX 5 Investment expenses.	
BOX 6 Foreign tax paid	
BOX 7 Foreign country or U.S. possession	
BOX 8 Tax-exempt interest.	
BOX 9 Specified private activity bond interest	
BOX 10 Market discount	
BOX 11 Bond premium.	
BOX 12 Bond premium on Treasury obligations.	
BOX 13 Bond premium on tax-exempt bond	
BOX 14 Tax-exempt and tax credit bond CUSIP no.	
BOX 15 State	
BOX 16 State identification no.	
BOX 17 State tax withheld.	
FATCA filing requirement	

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

(Keep for your records)

TAXMASTER2L

(27)

5498 Ben Johnson.pdf

advisor.

For a complete list of account positions see your December statement.

745926.29.0 01/14/2022 eDelivered Continued on nex

2021 Form 5498 IRA Contribution Information

Account No.	Participant TIN	Page
[redacted]	[redacted]	2 of 2

TRUSTEE'S or ISSUER'S TIN: 04-3523567

Premiere Select®

NATIONAL FINANCIAL SERVICES LLC
Agent for Fidelity Management Trus
P.O. Box 28019
Albuquerque, NM 87125-8019

eDelivered

BEN FRANK JOHNSON
PO BOX 220169
GLENWOOD FL 32722-0169

Customer Service: 386-734-9

IRA Beneficiary Summary Statement as of December 31, 2021 (not reported

Account Type	Account Number	Share	Date of	Relationship
[redacted]				

100%

Items in "All Downloads"

https://drtcpa.sharefile.com/share/view/[redacted]

1/1

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.
FLORIDA RETIREMENT SYSTEM
DIVISION OF RETIREMENT
PO BOX 9000
TALLAHASSEE FL 32315-9000

844-377-1888

1 Gross distribution: $ 75,528.90
2a Taxable amount: $ 75,442.62
OMB No. 1545-0119
2021
Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

2b Taxable amount not determined ☐ Total distribution ☐

PAYER'S TIN: [redacted]
RECIPIENT'S TIN: [redacted]

3 Capital gain (included in box 2a): $
4 Federal income tax withheld: $ 13,771.80

RECIPIENT'S name

BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722 0169

5 Employee contributions/ Designated Roth contributions or insurance premiums: $ 86.28
6 Net unrealized appreciation in employer's securities: $
7 Distribution code(s): 7
IRA/ SEP/ SIMPLE ☐
8 Other: $ %
9a Your percentage of total distribution: %
9b Total employee contributions: $ 0.00

10 Amount allocable to IRR within 5 years: $
11 1st year of desig. Roth contrib.
12 FATCA filing requirement ☐
14 State tax withheld: $
15 State/Payer's state no.
16 State distribution: $

Account number (see instructions): [redacted]
13 Date of payment
17 Local tax withheld: $
18 Name of locality
19 Local distribution: $

Copy B

Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.

This information is being furnished to the IRS.

Form 1099-R www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

---

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.
FLORIDA RETIREMENT SYSTEM
DIVISION OF RETIREMENT
PO BOX 9000
TALLAHASSEE FL 32315-9000

844-377-1888

1 Gross distribution: $ 75,528.90
2a Taxable amount: $ 75,442.62
OMB No. 1545-0119
2021
Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

2b Taxable amount not determined ☐ Total distribution ☐

PAYER'S TIN: [redacted]
RECIPIENT'S TIN: [redacted]

3 Capital gain (included in box 2a): $
4 Federal income tax withheld: $ 13,771.80

RECIPIENT'S name

BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722 0169

5 Employee contributions/ Designated Roth contributions or insurance premiums: $ 86.28
6 Net unrealized appreciation in employer's securities: $
7 Distribution code(s): 7
IRA/ SEP/ SIMPLE ☐
8 Other: $ %
9a Your percentage of total distribution: %
9b Total employee contributions: $ 0.00

10 Amount allocable to IRR within 5 years: $
11 1st year of desig. Roth contrib.
12 FATCA filing requirement ☐
14 State tax withheld: $
15 State/Payer's state no.
16 State distribution: $

Account number (see instructions): [redacted]
13 Date of payment
17 Local tax withheld: $
18 Name of locality
19 Local distribution: $

Copy C

For Recipient's Records

This information is being furnished to the IRS.

Form 1099-R (keep for your records) www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

30

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.
FLORIDA RETIREMENT SYSTEM
DIVISION OF RETIREMENT
PO BOX 9000
TALLAHASSEE FL 32315-9000

844-377-1888

1 Gross distribution: $ 79,241.70
2a Taxable amount: $ 79,241.70
2b Taxable amount not determined ☐ Total distribution ☐
3 Capital gain (included in box 2a): $
4 Federal income tax withheld: $ 25,646.64
5 Employee contributions/ Designated Roth contributions or insurance premiums: $ 0.00
6 Net unrealized appreciation in employer's securities: $
7 Distribution code(s): 7 IRA/ SEP/ SIMPLE ☐
8 Other: $ %
9a Your percentage of total distribution: %
9b Total employee contributions: $ 0.00
10 Amount allocable to IRR within 5 years: $
11 1st year of desig. Roth contrib.
12 FATCA filing requirement ☐
13 Date of payment
14 State tax withheld: $
15 State/Payer's state no.
16 State distribution: $
17 Local tax withheld: $
18 Name of locality
19 Local distribution: $
Account number (see instructions): [redacted]

OMB No. 1545-0119
2021
Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Copy B

Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.

This information is being furnished to the IRS.

RECIPIENT'S name
BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722 0169

PAYER'S TIN: [redacted]
RECIPIENT'S TIN: [redacted]

Form 1099-R www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

---

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.
FLORIDA RETIREMENT SYSTEM
DIVISION OF RETIREMENT
PO BOX 9000
TALLAHASSEE FL 32315-9000

844-377-1888

1 Gross distribution: $ 79,241.70
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2b Taxable amount not determined ☐ Total distribution ☐
3 Capital gain (included in box 2a): $
4 Federal income tax withheld: $ 25,646.64
5 Employee contributions/ Designated Roth contributions or insurance premiums: $ 0.00
6 Net unrealized appreciation in employer's securities: $
7 Distribution code(s): 7 IRA/ SEP/ SIMPLE ☐
8 Other: $ %
9a Your percentage of total distribution: %
9b Total employee contributions: $ 0.00
10 Amount allocable to IRR within 5 years: $
11 1st year of desig. Roth contrib.
12 FATCA filing requirement ☐
13 Date of payment
14 State tax withheld: $
15 State/Payer's state no.
16 State distribution: $
17 Local tax withheld: $
18 Name of locality
19 Local distribution: $
Account number (see instructions): [redacted]

OMB No. 1545-0119
2021
Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Copy C

For Recipient's Records

This information is being furnished to the IRS.

RECIPIENT'S name
BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722 0169

PAYER'S TIN: [redacted]
RECIPIENT'S TIN: [redacted]

Form 1099-R (keep for your records) www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2021 • PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
• SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name	Box 2. Beneficiary's Social Security Number
BEN F JOHNSON	[redacted]

Box 3. Benefits Paid in 2021	Box 4. Benefits Repaid to SSA in 2021	Box 5. Net Benefits for 2021 *(Box 3 minus Box 4)*
$32,784.00	NONE	$32,784.00

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or Direct deposit	$32,784.00
Benefits for 2021	$32,784.00

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

NONE

Box 7. Address

BEN F JOHNSON
PO BOX 220169
GLENWOOD FL 32722-0169

Box 8. Claim Number (*Use this number if you need to contact SSA.*)

[redacted]

Form **SSA-1099-SM** (1-2022) **DO NOT RETURN THIS FORM TO SSA OR IRS**

Fidelity INVESTMENTS

FIDELITY BROKERAGE SERVICES LLC
P.O. Box 28019
Albuquerque, NM 87125-8019

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441
Recipient ID [redacted] Payer's Fed ID Numbe[redacted]

eDelivered

BEN FRANK JOHNSON
PO BOX 220169
GLENWOOD FL 32722-0169

Payer's Name and Address:
NATIONAL FINANCIAL SERVICES LLC
499 WASHINGTON BLVD
JERSEY CITY, NJ 07310

Form 1099-DIV * — 2021 Dividends and Distributions

Copy B for Recipient
(OMB No. 1545-0110)

1a	Total Ordinary Dividends	13,642.69	
1b	Qualified Dividends	9,002.47	
2a	Total Capital Gain Distributions	1,366.66	
2b	Unrecap. Sec 1250 Gain	0.00	
2c	Section 1202 Gain	0.00	
2d	Collectibles (28%) Gain	0.00	
3	Nondividend Distributions	0.00	
4	**Federal Income Tax Withheld**	**0.00**	
5	Section 199A Dividends	98.51	
6	Investment Expenses	0.00	
7	Foreign Tax Paid	50.48	
8	Foreign Country or U.S. Possession	Various	
9	Cash Liquidation Distributions	0.00	
10	Non-Cash Liquidation Distributions	0.00	
11	Exempt Interest Dividends	0.00	
12	Specified Private Activity Bond Interest Dividends	0.00	
13	State		
14	State Identification No.		
15	State Tax Withheld	0.00	

Form 1099-INT * — 2021 Interest Income

Copy B for Recipient
(OMB No. 1545-0112)

1	Interest Income	1.22	
2	Early Withdrawal Penalty	0.00	
3	Interest on U.S. Savings Bonds and Treas. Obligations	0.00	
4	**Federal Income Tax Withheld**	**0.00**	
5	Investment Expenses	0.00	
6	Foreign Tax Paid	0.00	
7	Foreign Country or U.S. Possession		
8	Tax-Exempt Interest	0.00	
9	Specified Private Activity Bond Interest	0.00	
10	Market Discount	0.00	
11	Bond Premium	0.00	
12	Bond Premium on U.S. Treasury Obligations	0.00	
13	Bond Premium on Tax-Exempt Bond	0.00	
14	Tax-Exempt Bond CUSIP no.		
15	State		
16	State Identification No		
17	State Tax Withheld	0.00	

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Fidelity INVESTMENTS

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441
Recipient ID N[redacted] Payer's Fed ID Numb[redacted]

Form 1099-MISC * **2021 Miscellaneous Information** Copy B for Recipient (OMB No. 1545-0115)

2 Royalties	0.00	15 State Tax Withheld	0.00
3 Other Income	0.00	16 State/Payer's State No.	
4 Federal Income Tax Withheld	**0.00**	17 State Income	0.00
8 Substitute Payments in Lieu of Dividends or Interest	0.00		

Summary of 2021 Proceeds From Broker and Barter Exchange Transactions

1099-B Section	Total Proceeds	Total Cost Basis	Total Market Discount	Total Wash Sales	Realized Gain/Loss	**Federal Income Tax Withheld**
Short-term transactions for which basis is reported to the IRS	122,404.69	123,405.77	0.00	0.00	-1,001.08	0.00
Short-term transactions for which basis is not reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is reported to the IRS	43,475.05	34,242.09	0.00	0.00	9,232.96	0.00
Long-term transactions for which basis is not reported to the IRS	516.66	401.63	0.00	0.00	115.03	0.00
Transactions for which basis is not reported to the IRS and Term is Unknown	0.00	0.00	0.00	0.00	0.00	0.00
	166,396.40	158,049.49	0.00	0.00	8,346.91	0.00

1099-B amounts are reported individually to the IRS. Refer to the Form 1099-B sections in this statement, if applicable.

Summary of 2021 Original Issue Discount

Total Original Issue Discount	0.00	Total Original Issue Discount - REMIC	0.00
Total Original Issue Discount on U.S. Treasury Obligations	0.00		
Total Original Issue Discount on Tax-Exempt Obligations	0.00		

Original Issue Discount (OID) amounts are reported individually to the IRS. Refer to the Form 1099-OID pages in this statement, if applicable.

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Fidelity INVESTMENTS

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441
Recipient ID No. ***-[redacted] Payer's Fed ID Number [redacted]

FORM 1099-B* **2021 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB No. 1545-0715

Short-term transactions for which basis is reported to the IRS –report on Form 8949 with Box A checked and/or Schedule D, Part I
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes **2, 5, 6 & 12**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP										
Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Accrued Market Discount	**1g** Wash Sale Loss Disallowed	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State **16** State Tax Withheld
AT&T INC COM USD1, T, 00206R102										
Sale	320.000	01/15/21	05/18/21	9,445.71	9,342.94			102.77		
FID CONSERVATIVE INCOME BOND FUND, FCONX, [redacted]										
Sale	9,445.825	various	01/14/21	95,025.00	95,025.00			0.00		
FIDELITY ADVISOR INV GRADE BOND CL Z, FIKQX, [redacted]										
Sale	441.354	01/26/21	03/23/21	3,667.65	3,769.16			-101.51		
ISHARES TRUST 0-5YR HIGH YIELD CORP BD I, SHYG, [redacted]										
Sale	125.000	01/26/21	03/02/21	5,691.38	5,690.63			0.75		
LOCKHEED MARTIN CORPCOM USD1.00, LMT, [redacted]										
Sale	25.000	05/26/21	12/22/21	8,574.95	9,578.04			-1,003.09		
TOTALS				**122,404.69**	**123,405.77**	**0.00**	**0.00**		**0.00**	
			Box A Short-Term Realized Gain					**103.52**		
			Box A Short-Term Realized Loss					**-1,104.60**		

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Fidelity INVESTMENTS

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Numbe[redacted]

FORM 1099-B* 2021 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes **2, 5, 6 & 12**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP / Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Accrued Market Discount	**1g** Wash Sale Loss Disallowed	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State **16** State Tax Withheld
APPLE INC COM USD0.00001, AAPL, 037833100										
Sale	47.000	09/24/13	01/14/21	6,064.93	823.39			5,241.54		
INVESCO EXCH TRD SLFIDX FD TR BULSHS 202, BSCP, [redacted]										
Sale	600.000	02/21/20	03/01/21	13,350.89	13,092.00			258.89		
INVESCO EXCH TRD SLFIDX FD TR BULSHS 202, BSCO, [redacted]										
Sale	600.000	02/21/20	03/01/21	13,354.37	13,044.84			309.53		
ISHARES CORE S&P SMALL-CAP E, IJR, [redacted]										
Sale	45.000	05/03/19	03/23/21	4,754.36	3,651.60			1,102.76		
ORGANON &CO COMMON STOCK, OGN, [redacted]										
Cash In Lieu	0.314	05/06/15	06/07/21	9.92	9.06			0.86		
Sale	10.686	05/06/15	06/08/21	310.44	308.05			2.39		
Subtotals				**320.36**	**317.11**					
UNITED PARCEL SERVICE INC, UPS, [redacted]										
Sale	25.000	02/01/18	06/04/21	5,238.10	2,968.42			2,269.68		
VIATRIS INC COM, VTRS, 92556V106										
Sale	24.523	12/16/16	05/18/21	392.04	344.73			47.31		
TOTALS				**43,475.05**	**34,242.09**	**0.00**	**0.00**		**0.00**	
		Box D Long-Term Realized Gain						**9,232.96**		
		Box D Long-Term Realized Loss						**0.00**		

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Fidelity INVESTMENTS

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441
Recipient ID No. [redacted] Payer's Fed ID Numbe[redacted]

FORM 1099-B* 2021 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
Proceeds are reported as **gross proceeds** unless otherwise indicated (a).(This Label is a Substitute for Boxes **2, 5, 6 & 12**)

(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP / Action	Quantity	**1b** Date Acquired	**1c** Date Sold or Disposed	**1d** Proceeds	**1e** Cost or Other Basis (b)	**1f** Accrued Market Discount	**1g** Wash Sale Loss Disallowed	Gain/Loss (-)	**4 Federal Income Tax Withheld**	**14** State **16** State Tax Withheld
ORGANON &CO COMMON STOCK, OGN, [redacted]										
Cash In Lieu	0.186	01/27/12	06/07/21	5.86	3.41			2.45		
Sale	6.314	01/27/12	06/08/21	183.43	115.93			67.50		
Subtotals				**189.29**	**119.34**					
VIATRIS INC COM, VTRS, [redacted]										
Sale	12.262	06/24/02	05/18/21	196.03	183.90			12.13		
Sale	6.131	10/15/02	05/18/21	98.02	84.08			13.94		
Sale	2.084	10/13/08	05/18/21	33.32	14.31			19.01		
Subtotals				**327.37**	**282.29**					
TOTALS				**516.66**	**401.63**	**0.00**	**0.00**		**0.00**	
		Box E Long-Term Realized Gain						**115.03**		
		Box E Long-Term Realized Loss						**0.00**		

For any transaction listed on Form 1099-B in a section indicating that **"basis is reported to the IRS"**, we are reporting to the IRS: **1a** Description of Property, **2** type of gain or loss (i.e. short-term or long-term), **3** Proceeds from QOF (Qualified Opportunity Fund), **6** Gross or Net Proceeds, **12** basis reported to IRS, and columns **1b**, **1c**, **1d**, **1e**, **1f**, **1g**, **4**, **7**, **14**, **15** and **16**. We are not reporting to the IRS: the Action, the Gain/Loss, and all subtotals and totals.

For any transaction listed on Form 1099-B in a section indicating that **"basis is not reported to the IRS"**, we are reporting to the IRS: **1a** Description of Property, **3** Proceeds from QOF (Qualified Opportunity Fund), **5** Noncovered security, **6** Gross or Net Proceeds, and columns **1c**, **1d**, **4**, **14**, **15** and **16**. We are not reporting to the IRS: **2** type of gain or loss (i.e. short-term or long-term), the Action, the Gain/Loss, columns **1b**, **1e**, **1f**, **1g**, **2**, **7** and **12** and all subtotals and totals.

For any section 1256 option contracts we are reporting to the IRS: **1a** Description of Property and totals for boxes **8**, **9**, **10** and **11**.

Although Fidelity makes every effort to provide accurate information, please bear in mind that you, the taxpayer, are ultimately responsible for the accuracy of your tax returns.

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Fidelity INVESTMENTS

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] ayer's Fed ID Numbe[redacted]

FORM 1099-B* **2021 Proceeds from Broker and Barter Exchange Transactions** Copy B for Recipient OMB No. 1545-0715

(b) Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition premium, bond premium, market discount, market premium, and option premium.

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments and unit investment trusts.

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Fidelity INVESTMENTS

2021 TAX REPORTING STATEMENT

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] yer's Fed ID Numb[redacted]

Summary of 2021 Supplemental Information Not Reported to the IRS

Margin Interest Paid	0.00	Currency Realized Gain/Loss (USD)	0.00
Tax Exempt Investment Expense	0.00	Actual Payment Shortfall	0.00
Accrued Interest Paid on Purchases	0.00	Addition to Basis	0.02
Proceeds Investment Expenses	0.00	Account Fees	9,598.00
Severance Tax	0.00	Short Dividends	0.00
Administrative Expenses	0.00	Money Market Realized Gain/Loss	0.00
Non-deductible Generic Expenses	0.00	Short/Long Term Realized Gain/Loss	0.00
Deductible Generic Expenses	0.00	Mortgage Pool Statement (MBS)	0.00

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Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
AMERICAN ELEC PWR CO INC COM, AEP, [redacted]								
03/10/21	99.90			99.90				
06/10/21	99.90			99.90				
09/10/21	99.90			99.90				
12/10/21	105.30			105.30				
Subtotals	**405.00**			**405.00**				
APPLE INC, AAPL, [redacted]								
02/11/21	62.53			62.53				
05/13/21	67.10			67.10				
08/12/21	67.10			67.10				
11/11/21	67.10			67.10				
Subtotals	**263.83**			**263.83**				
AT&T INC COM USD1, T, [redacted]								
05/03/21	166.40			166.40				
CISCO SYSTEMS INC, CSCO, [redacted]								
01/20/21	99.00			99.00				
04/28/21	101.75			101.75				
07/28/21	101.75			101.75				
10/27/21	101.75			101.75				
Subtotals	**404.25**			**404.25**				
FID CONSERVATIVE INCOME BOND FUND, FCONX, [redacted]								
01/14/21	13.17	13.17						
12/31/21	0.13	0.13						
Subtotals	**13.30**	**13.30**						

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
FIDELITY ADVISOR INTL CAP APPREC CL Z, FIDZX, [redacted]								
12/03/21	323.59	0.03		323.56				50.48
FIDELITY ADVISOR INV GRADE BOND CL Z, FIKQX, [redacted]								
01/29/21	6.95	6.95						
02/26/21	36.54	36.54						
03/31/21	40.69	40.69						
04/30/21	36.28	36.28						
05/28/21	36.39	36.39						
06/30/21	34.53	34.53						
07/30/21	34.33	34.33						
08/31/21	34.53	34.53						
09/30/21	35.43	35.43						
10/29/21	36.91	36.91						
11/30/21	36.07	36.07						
12/03/21	12.57		12.57					
12/31/21	39.88	39.88						
Subtotals	**421.10**	**408.53**	**12.57**					
FIDELITY ADVISOR TOTAL BOND CL Z, FBKWX, [redacted]								
01/29/21	62.37	62.37						
02/26/21	70.26	70.26						
03/31/21	79.82	79.82						
04/30/21	79.16	79.16						
05/28/21	79.37	79.37						
06/30/21	87.79	87.79						
07/30/21	92.49	92.49						
08/31/21	91.59	91.59						
09/30/21	86.85	86.85						
10/29/21	91.12	91.12						
11/30/21	88.94	88.94						

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Numbe[redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
FIDELITY ADVISOR TOTAL BOND CL Z, FBKWX, [redacted]								
12/22/21	64.47	64.47						
12/31/21	99.67	99.67						
Subtotals	**1,073.90**	**1,073.90**						
FIDELITY FLOATING RATE HIGH INCOME, FFRHX, [redacted]								
03/31/21	29.16	29.16						
04/30/21	47.63	47.63						
05/28/21	45.36	45.36						
06/30/21	44.09	44.09						
07/30/21	48.30	48.30						
08/31/21	47.66	47.66						
09/30/21	44.34	44.34						
10/29/21	46.36	46.36						
11/30/21	43.41	43.41						
12/22/21	24.31	24.31						
12/31/21	46.97	46.97						
Subtotals	**467.59**	**467.59**						
FIDELITY HIGH YIELD FACTOR ETF, FDHY, [redacted]								
04/01/21	48.05	48.05						
05/03/21	53.01	53.01						
06/01/21	57.04	57.04						
07/01/21	57.04	57.04						
08/02/21	58.59	58.59						
09/01/21	57.04	57.04						
10/01/21	58.59	58.59						
11/01/21	58.90	58.90						
12/01/21	60.45	60.45						
12/08/21	295.74		295.74					

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Numbe[redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
FIDELITY HIGH YIELD FACTOR ETF, FDHY, 3[redacted]								
01/03/22	63.86	63.86						
Subtotals	**868.31**	**572.57**	**295.74**					
HOME DEPOT INC, HD, [redacted]								
03/25/21	97.35			97.35				
06/17/21	97.35			97.35				
09/16/21	97.35			97.35				
12/16/21	97.35			97.35				
Subtotals	**389.40**			**389.40**				
INVESCO EXCH TRD SLF IDX FD TR BULSHS, BSCP, [redacted]								
01/29/21	21.79	21.79						
02/26/21	18.91	18.91						
Subtotals	**40.70**	**40.70**						
INVESCO EXCH TRD SLF IDX FD TR BULSHS, BSCO, [redacted]								
01/29/21	24.50	24.50						
02/26/21	21.07	21.07						
Subtotals	**45.57**	**45.57**						
ISHARES CORE S&P SMALL-CAP E, IJR, [redacted]								
03/31/21	41.17	15.63		21.77	3.77			
06/16/21	39.22	12.19		23.44	3.59			
09/30/21	77.63	8.65		61.88	7.10			
12/17/21	113.81	12.68		90.73	10.40			
Subtotals	**271.83**	**49.15**		**197.82**	**24.86**			

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
ISHARES TR PFD AND INCM SEC, PFF, [redacted]								
04/08/21	83.32	20.62		56.61	6.09			
05/07/21	85.98	26.60		53.09	6.29			
06/07/21	86.03	26.61		53.13	6.29			
07/08/21	84.75	26.22		52.33	6.20			
08/06/21	82.80	25.61		51.13	6.06			
09/08/21	83.48	25.83		51.55	6.10			
10/07/21	81.75	25.29		50.48	5.98			
11/05/21	75.21	23.27		46.44	5.50			
12/07/21	67.92	21.01		41.94	4.97			
12/22/21	69.32	21.44		42.81	5.07			
Subtotals	**800.56**	**242.50**		**499.51**	**58.55**			
ISHARES TRUST S & P MID CAPITAL*, IJJ, [redacted]								
03/31/21	34.40	1.23		30.02	3.15			
06/16/21	31.84	2.59		26.33	2.92			
09/30/21	51.68	4.20		42.74	4.74			
12/17/21	46.80	3.81		38.70	4.29			
Subtotals	**164.72**	**11.83**		**137.79**	**15.10**			
ISHARES TRUST 0-5YR HIGH YIELD CORP BD, SHYG [redacted]								
02/05/21	134.39	134.39						
03/05/21	137.56	137.56						
04/08/21	113.27	113.27						
05/07/21	105.65	105.65						
06/07/21	105.56	105.56						
07/08/21	103.90	103.90						
08/06/21	102.78	102.78						
09/08/21	99.61	99.61						
10/07/21	103.06	103.06						
11/05/21	98.65	98.65						

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Nu[redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
ISHARES TRUST 0-5YR HIGH YIELD CORP BD, SHYG, [redacted]								
12/07/21	100.85	100.85						
12/22/21	102.45	102.45						
Subtotals	**1,307.73**	**1,307.73**						
JOHNSON &JOHNSON COM USD1.00, JNJ, [redacted]								
03/09/21	91.91			91.91				
06/08/21	96.46			96.46				
09/07/21	96.46			96.46				
12/07/21	96.46			96.46				
Subtotals	**381.29**			**381.29**				
JPMORGAN CHASE & CO, JPM, 4[redacted]								
01/31/21	147.60			147.60				
04/30/21	147.60			147.60				
07/31/21	147.60			147.60				
10/31/21	164.00			164.00				
Subtotals	**606.80**			**606.80**				
LOCKHEED MARTIN CORP COM USD1.00, LM[redacted]								
06/25/21	65.00			65.00				
09/24/21	65.00			65.00				
12/27/21	70.00			70.00				
Subtotals	**200.00**			**200.00**				
MCDONALD S CORP, MCD, [redacted]								
03/15/21	77.40			77.40				
06/15/21	77.40			77.40				
09/15/21	77.40			77.40				

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
MCDONALD S CORP, MCD, [redacted]								
12/15/21	82.80			82.80				
Subtotals	**315.00**			**315.00**				
MEDTRONIC PLC, MDT, [redacted]								
01/15/21	58.00			58.00				
04/16/21	58.00			58.00				
07/16/21	63.00			63.00				
10/15/21	63.00			63.00				
Subtotals	**242.00**			**242.00**				
MERCK &CO. INC COM, MRK, [redacted]								
01/08/21	113.75			113.75				
04/07/21	113.75			113.75				
07/07/21	113.75			113.75				
10/07/21	113.75			113.75				
Subtotals	**455.00**			**455.00**				
MICROSOFT CORP, MSFT, [redacted]								
03/11/21	44.80			44.80				
06/10/21	44.80			44.80				
09/09/21	44.80			44.80				
12/09/21	49.60			49.60				
Subtotals	**184.00**			**184.00**				
NEXTERA ENERGY INC COM USD0.01, NEE, [redacted]								
03/15/21	77.00			77.00				
06/15/21	77.00			77.00				
09/15/21	77.00			77.00				

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
NEXTERA ENERGY INC COM USD0.01, [redacted]								
12/15/21	77.00			77.00				
Subtotals	**308.00**			**308.00**				
PEPSICO INC, PEP, [redacted]								
01/07/21	113.50			113.50				
03/31/21	113.50			113.50				
06/30/21	119.33			119.33				
09/30/21	119.33			119.33				
Subtotals	**465.66**			**465.66**				
PFIZER INC, PFE[redacted]								
03/05/21	143.13			143.13				
06/04/21	143.13			143.13				
09/07/21	143.13			143.13				
12/06/21	143.13			143.13				
Subtotals	**572.52**			**572.52**				
PNC FINANCIAL SERVICES GROUP COM USD5, PNC, [redacted]								
02/05/21	97.75			97.75				
05/05/21	97.75			97.75				
08/05/21	106.25			106.25				
11/05/21	106.25			106.25				
Subtotals	**408.00**			**408.00**				
PROCTER AND GAMBLE CO COM, PG, [redacted]								
02/16/21	79.07			79.07				
05/17/21	86.98			86.98				
08/16/21	86.98			86.98				

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. ***[redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
PROCTER AND GAMBLE CO COM, PG, [redacted]								
11/15/21	86.98			86.98				
Subtotals	**340.01**			**340.01**				
STARBUCKS CORP COM USD0.001, SBUX, [redacted]								
03/05/21	67.50			67.50				
05/28/21	67.50			67.50				
08/27/21	67.50			67.50				
11/26/21	73.50			73.50				
Subtotals	**276.00**			**276.00**				
UNITED PARCEL SERVICE INC, UPS, [redacted]								
03/10/21	102.00			102.00				
06/09/21	102.00			102.00				
09/09/21	76.50			76.50				
12/08/21	76.50			76.50				
Subtotals	**357.00**			**357.00**				
UNITEDHEALTH GROUP INC, UNH, [redacted]								
03/23/21	37.50			37.50				
06/29/21	43.50			43.50				
09/21/21	43.50			43.50				
12/14/21	43.50			43.50				
Subtotals	**168.00**			**168.00**				
VERIZON COMMUNICATIONS INC, VZ, [redacted]								
02/01/21	155.62			155.62				
05/03/21	155.62			155.62				
08/02/21	155.62			155.62				

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. ***-*[redacted] ayer's Fed ID Number [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP / Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
VERIZON COMMUNICATIONS INC, VZ, [redacted]								
11/01/21	158.72			158.72				
Subtotals	**625.58**			**625.58**				
VISA INC, V, [redacted]								
03/01/21	19.20			19.20				
06/01/21	19.20			19.20				
09/01/21	19.20			19.20				
12/07/21	22.50			22.50				
Subtotals	**80.10**			**80.10**				
WALMART INC COM, WMT, [redacted]								
01/04/21	56.70			56.70				
04/05/21	57.75			57.75				
06/01/21	57.75			57.75				
09/07/21	57.75			57.75				
Subtotals	**229.95**			**229.95**				
TOTALS	**13,642.69**	**4,233.40**	**308.31**	**9,002.47**	**98.51**	**0.00**	**0.00**	**50.48**

Short-term capital gain distributions reported on monthly/quarterly account statements are included in **1a** Total Ordinary Dividends on Form 1099-DIV.

To see the **2021** State Percentages of Tax-Exempt Income for Fidelity Federal Tax-Exempt Funds or the Percentage of Income from U.S. Government Securities for applicable Fidelity Funds, visit **Fidelity.com/fundtaxinfo**.

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. *[redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-DIV Transactions

Total Capital Gains Distributions Detail

Description, Symbol, CUSIP Date	**2a** Total Capital Gain Distr. (m)	Capital Gain Distributions Subject to Applicable Rate (m)	**2b** Unrecaptured Section 1250 Gain	**2c** Section 1202 Gain	**2d** Collectibles (28%) Gain
FIDELITY ADVISOR INTL CAP APPREC CL Z, FIDZX, 3[redacted]					
12/03/21	1,289.96	1,289.96			
FIDELITY ADVISOR TOTAL BOND CL Z, FBKWX, [redacted]					
12/03/21	22.76	22.76			
FIDELITY HIGH YIELD FACTOR ETF, FDHY, [redacted]					
12/08/21	53.94	53.94			
TOTALS	**1,366.66**	**1,366.66**	**0.00**	**0.00**	**0.00**

(m) **2a** Total Capital Gain includes **2b**, **2c** and **2d**. The portion of Capital Gain Distributions is subject to Applicable Rate.

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Num[redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Details of 1099-INT Transactions

Interest Income Details, Taxable Obligations

Description, Symbol, CUSIP Date	1 Interest Income	6 Foreign Tax Paid	11 Bond Premium	Noncovered Bond Premium	10 Market Discount	Noncovered Market Discount
FDIC BANK DEPOSIT SWEEP NOT COVERED BY, QIWSQ, F[redacted]						
01/29/21	0.30					
02/08/21	0.04					
02/26/21	0.12					
03/31/21	0.20					
04/20/21	0.03					
04/30/21	0.01					
05/28/21	0.08					
06/30/21	0.06					
07/30/21	0.06					
08/31/21	0.06					
09/30/21	0.07					
10/29/21	0.06					
11/30/21	0.06					
12/31/21	0.07					
Subtotals	**1.22**					
TOTALS	**1.22**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. [redacted] Payer's Fed ID Number [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Account Fees

Description	Date	Amount
Advisor Fee	01/14/21	1,141.00
Advisor Fee	01/14/21	1,141.00
Advisor Fee	04/14/21	1,173.00
Advisor Fee	04/14/21	1,173.00
Advisor Fee	07/14/21	1,239.00
Advisor Fee	07/14/21	1,239.00
Advisor Fee	10/08/21	1,246.00
Advisor Fee	10/08/21	1,246.00
TOTAL		**9,598.00**

Addition to Basis

Description	CUSIP	Date	Amount
FIDELITY ADVISOR INTL CAP APPREC CL Z	315920157	12/03/21	0.02
TOTAL			**0.02**

Fidelity INVESTMENTS

2021 SUPPLEMENTAL INFORMATION

BEN FRANK JOHNSON

Account No. [redacted] Customer Service: 386-734-9441

Recipient ID No. ***-[redacted] Payer's Fed ID Number: [redacted]

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

Foreign Income and Taxes Summary

This schedule lists all income and foreign tax by country. Foreign income and tax from mutual funds is listed in a separate section with a country designation of "RIC"

RICs

Country	Security description	CUSIP	Dividends		Interest	Total Foreign Income	Foreign Tax Paid
			Nonqualified	Qualified			
RIC							
	FIDELITY ADVISOR INTL CAP APPREC CL Z	315920157	0.00	323.59	0.00	323.59	50.48
TOTAL RICs			**0.00**	**323.59**	**0.00**	**323.59**	**50.48**

Total Foreign Source Income utilizes the "Total" column for RICs which may not always be supplied.
N/A - Qualified Foreign Source Income utilizes the "Qualified" column for RICs which may not always be supplied.

Important Tax Return Document Enclosed.

(26)

5498 Ben Johnson.pdf

Premiere Select

NATIONAL FINANCIAL SERVICES LLC
Agent for Fidelity Management Trust Company
P.O. Box 28019
Albuquerque, NM 87125-8019

2021 Form 5498 IRA Contribution Ir

Account No.	Participant TIN
[redacted]	***-[redacted]

TRUSTEE'S or ISSUER'S TIN: 04-3523567

eDelivered

BEN FRANK JOHNSON
PO BOX 220169
GLENWOOD FL 32722-0169

Customer Service: 386-734-9

Form 5498	2021 IRA Contribution Information This information is being furnished to the Internal Revenue Service.	OMB No.154
Account Number	[redacted]4	
5.Fair market value of account		$632,32
7.IRA Type		
11.Required Minimum Distribution for 2022		
12a.RMD date		04/01/

You May Need to Take a Distribution from Your IRA

Our records indicate that you will be 72 or older in 2022. Once you reach age 72, the Internal Revenue Service (IRS) requires you to withdraw a specific amount of money each year from your IRA(s). This amount is called Required Minimum Distribution, or RMD, and you are required to take it by your Required Beginning Date, which is generally April 1 of the year following the year you turn age 72. Subsequent withdrawals must be completed by December 31 every year thereafter. An RMD must be calculated separately for every IRA you may own, but you can take a distribution for the combined RMD amounts from any IRA you own. Generally, these rules do not apply to Roth IRAs during your lifetime, and to IRA Beneficiary Distribution Accounts (IRA-BDAs).

If you would like Fidelity Brokerage Services (FBS), as agent for Fidelity Management Trust Company, to calculate your RMD for the IRA account noted on this form, or if our records are incorrect, please contact your investment advisor.

[redacted] 4c

Schedule K-1 (Form 1120-S) — **2021**

Department of the Treasury
Internal Revenue Service

For calendar year 2021, or tax year beginning _____ ending _____

☐ Final K-1 ☐ Amended K-1 OMB No. 1545-0123

Shareholder's Share of Income, Deductions, Credits, etc. ▶ See separate instructions.

Part I Information About the Corporation

A Corporation's employer identification number
59-0580845

B Corporation's name, address, city, state, and ZIP code

SURETY BANK
P.O. BOX 819
DELAND, FL 32721

C IRS Center where corporation filed return
E-FILE

D Corporation's total number of shares
Beginning of tax year 201,299.00
End of tax year 201,299.00

Part II Information About the Shareholder

E Shareholder's identifying number
[redacted]

F Shareholder's name, address, city, state, and ZIP code

BEN FRANK JOHNSON
P.O. BOX 220169
GLENWOOD, FL 32722

G Current year allocation percentage ... .093660%

H Shareholder's number of shares
Beginning of tax year 187.00
End of tax year 374.00

I Loans from shareholder
Beginning of tax year ..... $ _____
End of tax year ..... $ _____

For IRS Use Only

Part III Shareholder's Share of Current Year Income, Deductions, Credits, and Other Items

1	Ordinary business income (loss) 4,266.	13	Credits
2	Net rental real estate inc (loss)		
3	Other net rental income (loss)		
4	Interest income		
5a	Ordinary dividends 6.		
5b	Qualified dividends	14	Schedule K-3 is attached if checked ▶ ☐
6	Royalties	15 A	Alternative min tax (AMT) items 2.
7	Net short-term capital gain (loss)		
8a	Net long-term capital gain (loss)		
8b	Collectibles (28%) gain (loss)		
8c	Unrecaptured sec 1250 gain		
9 *	Net section 1231 gain (loss) -3.	16 A*	Items affecting shareholder basis 407.
10	Other income (loss)	D	1,870.
		17 A	Other information 6.
11	Section 179 deduction	V	* STMT
12 A	Other deductions 4.	AC	* STMT

18 ☐ More than one activity for at-risk purposes*
19 ☐ More than one activity for passive activity purposes*
*See attached statement for additional information.

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SCHEDULE K-1 NET SECTION 1231 GAIN (LOSS), BOX 9

DESCRIPTION	AMOUNT	SHAREHOLDER FILING INSTRUCTIONS
FROM TRADE OR BUSINESS	-3.	SEE SHAREHOLDERS INSTRUCTIONS
TOTAL	-3.	

SCHEDULE K-1 TAX-EXEMPT INTEREST INCOME, BOX 16, CODE A

DESCRIPTION	AMOUNT	SHAREHOLDER FILING INSTRUCTIONS
OTHER STATES MUNICIPAL BOND INTEREST	407.	SEE SHAREHOLDERS INSTRUCTIONS
TOTAL	407.	

SCHEDULE K-1 SECTION 199A ADDITIONAL INFORMATION

THE SECTION 199A AMOUNTS TO BE USED IN THE CALCULATION OF THE QUALIFIED BUSINESS INCOME DEDUCTION ON YOUR 1040/1041 RETURN ARE REPORTED ON LINE 17, UNDER CODE V. PLEASE CONSULT YOUR TAX ADVISOR REGARDING THE CALCULATION OF QUALIFIED BUSINESS INCOME DEDUCTION, INCLUDING THE POSSIBLE AGGREGATIONS AND LIMITATIONS THAT MAY APPLY AND THE FILING OF THE 1.199A-4(C)(2)(I) ANNUAL DISCLOSURE STATEMENT.

SCHEDULE K-1 SECTION 199A ITEMS, BOX 17
CODE V

DESCRIPTION	AMOUNT
TRADE OR BUSINESS	
ORDINARY INCOME(LOSS)	4,266.
W-2 WAGES	2,061.
UNADJUSTED BASIS	1,724.

SCHEDULE K-1 GROSS RECEIPTS FOR SECTION 448(C), BOX 17, CODE AC

DESCRIPTION	AMOUNT
GROSS RECEIPTS - CURRENT YEAR	6.

List of Codes

This list identifies the codes used on Schedule K-1 for all shareholders. For detailed reporting and filing information, see the specific line instructions, earlier, and the instructions for your income tax return.

Box 10. Other income (loss)

Code

A Other portfolio income (loss)
B Involuntary conversions
C Section 1256 contracts & straddles
D Mining exploration costs recapture
E Section 951A(a) income inclusions
F Inclusions of subpart F income
G Section 951(a)(1)(B) inclusions
H Other income (loss)

Box 12. Other deductions

A Cash contributions (60%)
B Cash contributions (30%)
C Noncash contributions (50%)
D Noncash contributions (30%)
E Capital gain property to a 50% limit organization (30%)
F Capital gain property (20%)
G Contributions (100%)
H Investment interest expense
I Deductions - royalty income
J Section 59(e)(2) expenditures
K Reserved for future use
L Deductions - portfolio (other)
M Preproductive period expenses
N Reserved for future use
O Reforestation expense deduction
P Reserved for future use
Q Reserved for future use
R Reserved for future use
S Other deductions

Box 13. Credits

A Reserved for future use
B Reserved for future use
C Low-income housing credit (section 42(j)(5)) from post-2007 buildings
D Low-income housing credit (other) from post-2007 buildings
E Qualified rehabilitation expenditures (rental real estate)
F Other rental real estate credits
G Other rental credits
H Undistributed capital gains credit
I Biofuel producer credit
J Work opportunity credit
K Disabled access credit
L Empowerment zone employment credit
M Credit for increasing research activities
N Credit for employer social security and Medicare taxes
O Backup withholding
P Other credits

Box 15. Alternative minimum tax (AMT) items

A Post-1986 depreciation adjustment
B Adjusted gain or loss
C Depletion (other than oil & gas)
D Oil, gas, & geothermal-gross income
E Oil, gas, & geothermal-deductions
F Other AMT items

Box 16. Items affecting shareholder basis

A Tax-exempt interest income
B Other tax-exempt income
C Nondeductible expenses
D Distributions
E Repayment of loans from shareholders
F Foreign taxes paid or accrued

Box 17. Other information

A Investment income
B Investment expenses
C Qualified rehabilitation expenditures (other than rental real estate)
D Basis of energy property
E Recapture of low-income housing credit (section 42(j)(5))
F Recapture of low-income housing credit (other)
G Recapture of investment credit
H Recapture of other credits
I Look-back interest-completed long-term contracts
J Look-back interest-income forecast method
K Dispositions of property with section 179 deductions
L Recapture of section 179 deduction
M Section 453(l)(3) information
N Section 453A(c) information
O Section 1260(b) information
P Interest allocable to production expenditures
Q CCF nonqualified withdrawals
R Depletion information-oil and gas
S Reserved for future use
T Reserved for future use
U Net investment income
V Section 199A information
W Reserved for future use
X Reserved for future use
Y Reserved for future use
Z Reserved for future use
AA Excess taxable income
AB Excess business interest income
AC Gross receipts for section 448(c)
AD Other information