

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/23/2025

General Information

Name: Hon Stephanie Rebecca Silver

CONFIDENTIAL

PID 47114

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (11Th)	Elected Constitutional Officer	

Net Worth

My Net Worth as of December 31, 2024 was \$ 715,204.54.

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Assets

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 effect is \$ 70,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Home	\$ 620,000.00
Checking Account Wells Fargo (as of 5/30/25)	\$ 11,893.53
Campaign Loan to self	\$ 50,000.00
Voya Account (as of 6/9/25)	\$ 41,836.18
Checking Account JP Morgan (as of 6/12/25)	\$ 6,470.27
Brokerage Account JP Morgan (as of 6/12/25)	\$ 231,497.09
Leased Vehicle (value based on cargurus.com)	\$ 22,990.00
Savings Account Wells Fargo (as of 6/23/25) & JP Morgan	\$ 1,048.83

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Voya Financial (6/4/25)	230 Park Ave, NY NY 10169	\$ 10,583.60
Lincoln Automotive Financial (6/23/25)	PO Box 31111, Tampa, FL 33631	\$ 5,998.44
Citibank/Cenlar Loan Services (6/23/25)	425 Phillips Blvd, Trenton, NJ 08618	\$ 283,109.32

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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 2024 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 2024 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
See Attached		

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
See Attached			

Interests in Specified Businesses**Business Entity # 1**

N/A

Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

Stephanie Rebecca Silver

Digitally signed: 06/23/2025

Filed with COE: 06/23/2025

For the year Jan. 1–Dec. 31, 2024, or other tax year beginning _____, 2024, ending _____, 20

See separate instructions.

Your first name and middle initial Stephanie R		Last name Silver		Your social security number [REDACTED]	
If joint return, spouse's first name and middle initial		Last name		Spouse's social security number	
Home address (number and street). If you have a P.O. box, see instructions [REDACTED]				Apt. no. [REDACTED]	Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. ☒ You ☐ Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. [REDACTED]			State FL	ZIP code [REDACTED]	
Foreign country name		Foreign province/state/county		Foreign postal code	

Filing Status ☒ Single ☐ Head of household (HOH)

Check only one box. ☐ Married filing jointly (even if only one had income) ☐ Qualifying surviving spouse (QSS)

☐ Married filing separately (MFS) ☐ If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

☐ If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required):

Digital Assets At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

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

Age/Blindness You: ☐ Were born before January 2, 1960 ☐ Are blind Spouse: ☐ Was born before January 2, 1960 ☐ Is blind

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions): Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here ☐				☐	☐
				☐	☐
				☐	☐
				☐	☐

Income Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.	1a Total amount from Form(s) W-2, box 1 (see instructions)			1a	168,379.	
	b Household employee wages not reported on Form(s) W-2			1b		
	c Tip income not reported on line 1a (see instructions)			1c		
	d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)			1d		
	e Taxable dependent care benefits from Form 2441, line 26			1e		
	f Employer-provided adoption benefits from Form 8839, line 29			1f		
	g Wages from Form 8919, line 6			1g		
	h Other earned income (see instructions)			1h	0.	
	i Nontaxable combat pay election (see instructions)	1i				
	z Add lines 1a through 1h			1z	168,379.	
	2a Tax-exempt interest	2a	1,659.	b Taxable interest	2b	58.
	3a Qualified dividends	3a	841.	b Ordinary dividends	3b	2,246.
	4a IRA distributions	4a		b Taxable amount	4b	
	5a Pensions and annuities	5a		b Taxable amount	5b	
	6a Social security benefits	6a		b Taxable amount	6b	
c If you elect to use the lump-sum election method, check here (see instructions)			☐			
7 Capital gain or (loss). Attach Schedule D if required. If not required, check here			☐	7	1,544.	
8 Additional income from Schedule 1, line 10				8		
9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income				9	172,227.	
10 Adjustments to income from Schedule 1, line 26				10		
11 Subtract line 10 from line 9. This is your adjusted gross income				11	172,227.	
12 Standard deduction or itemized deductions (from Schedule A)				12	14,600.	
13 Qualified business income deduction from Form 8995 or Form 8995-A				13	3.	
14 Add lines 12 and 13				14	14,603.	
15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income				15	157,624.	

Tax and Credits	16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	16	30,658.
	17	Amount from Schedule 2, line 3	17	0.
	18	Add lines 16 and 17	18	30,658.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	35.
	21	Add lines 19 and 20	21	35.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	30,623.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	0.
24	Add lines 22 and 23. This is your total tax	24	30,623.	

Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2	25a	31,519.
	b	Form(s) 1099	25b	
	c	Other forms (see instructions)	25c	
	d	Add lines 25a through 25c	25d	31,519.
	26	2024 estimated tax payments and amount applied from 2023 return	26	
	27	Earned income credit (EIC) ☐ No	27	
	28	Additional child tax credit from Schedule 8812	28	
	29	American opportunity credit from Form 8863, line 8	29	
	30	Reserved for future use	30	
31	Amount from Schedule 3, line 15	31		
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32		
33	Add lines 25d, 26, and 32. These are your total payments	33	31,519.	

Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	896.
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐	35a	896.
	b	Routing number XXXXXXXXXX c Type: ☒ Checking ☐ Savings		
	d	Account number XXXXXXXXXXXXXXXXXXXX		
36	Amount of line 34 you want applied to your 2025 estimated tax	36		

Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or 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	Phone no.	Personal identification number (PIN)

Sign Here	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
	Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
	Phone no. XXXXXXXXXX	Email address		

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
	Firm's name Self-Prepared	Phone no.			
	Firm's address	Firm's EIN			

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

2024
Attachment
Sequence No. **03**

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

Stephanie R Silver

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	35.
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	
5a	Residential clean energy credit from Form 5695, line 15	5a	
b	Energy efficient home improvement credit from Form 5695, line 32	5b	
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800	6a	
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	Reserved for future use	6e	
f	Clean 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	
m	Credit for previously owned clean vehicles. Attach Form 8936	6m	
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 4, 5a, 5b, and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20	8	35.

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962	9	
10	Amount paid with request for extension to file (see instructions)	10	
11	Excess social security and tier 1 RRTA tax withheld	11	
12	Credit for federal tax on fuels. Attach Form 4136	12	
13	Other payments or refundable credits:		
a	Form 2439	13a	
b	Section 1341 credit for repayment of amounts included in income from earlier years	13b	
c	Net elective payment election amount from Form 3800, Part III, line 6, column (j)	13c	
d	Deferred amount of net 965 tax liability (see instructions)	13d	
z	Other refundable credits (see instructions): _____	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31	15	

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

BAA

REV 02/22/25 irs.irs.gov/efile

Schedule 3 (Form 1040) 2024

SCHEDULE B
(Form 1040)

Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Stephanie R Silver

Interest and Ordinary Dividends

Attach to Form 1040 or 1040-SR.

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

OMB No. 1545-0074

2024

Attachment
Sequence No. 08

Your social security number

Part I
Interest

(See instructions
and the
Instructions for
Form 1040,
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.

- 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:

wells fargo
wells fargo savings
J.P. MORGAN BROKER-DEALER HOLDIN

Amount

1.
1.
56.42

1

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

2 58.42
3
4 58.42

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

Part II
Ordinary Dividends

(See instructions
and the
Instructions for
Form 1040,
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.

- 5 List name of payer: J.P. MORGAN BROKER-DEALER HOLDIN
J.P. MORGAN BROKER-DEALER HOLDIN

Amount
915.64
1,330.

5

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

6 2,245.64

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.
Additionally, you
may be required to
file Form 8938,
Statement of
Specified Foreign
Financial Assets.
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.

- 7a At any time during 2024, 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
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, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:
8 During 2024, 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

Yes	No
	X
	X

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

OMB No. 1545-0074

2024

Attachment
Sequence No. **12**

Name(s) shown on return

Stephanie R Silver

Your social security number

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	2,059.	2,067.		-8.
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	3,429.	3,461.		-32.
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 -40.

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	6,260.	5,723.		537.
8b Totals for all transactions reported on Form(s) 8949 with Box D checked	10,812.	9,965.	2.	849.
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
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				13 198.
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 1,584.

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

Schedule D (Form 1040) 2024

Part III Summary

16 Combine lines 7 and 15 and enter the result • 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? ☒ 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 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 20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below. 21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: • 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. 22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.	16 18 19 21 ()	1,544.
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Sales and Other Dispositions of Capital Assets

File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Go to www.irs.gov/Form8949 for instructions and the latest information.

Name(s) shown on return

Stephanie R Silver

Social security number or taxpayer identification number

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.

- ☒ **(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.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	0.793 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	03/01/23	02/22/24	8.	9.			-1.
	0.771 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	04/03/23	02/22/24	8.	9.			-1.
	0.757 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	05/01/23	02/22/24	8.	9.			-1.
	44 SH. SCHWAB STRATEGIC TR SHORT-TERM US TREAS	05/12/23	02/22/24	2,119.	2,145.			-26.
	0.766 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	06/01/23	02/22/24	8.	9.			-1.
	0.764 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	07/03/23	02/22/24	8.	9.			-1.
	0.753 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	08/01/23	02/22/24	8.	8.			0.
	0.767 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	09/01/23	02/22/24	8.	9.			-1.
	0.81 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	10/02/23	02/22/24	8.	9.			-1.
	0.818 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	11/01/23	02/22/24	8.	9.			-1.
	0.809 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	12/01/23	02/22/24	8.	9.			-1.
	0.641 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	01/02/24	02/22/24	7.	7.			0.
	0.629 SH. **BLACKROCK MUN BD FO INC NATIONAL MINI	02/01/24	02/22/24	6.	7.			-1.
	7 SH. J P MORGAN EXCHANGE TRADED FD TR BETABO	02/22/24	11/22/24	398.	403.			-5.
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked).				2,610.	2,651.		-41.

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

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

Social security number or taxpayer identification number

Stephanie R Silver

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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.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	73.415 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	01/13/21	02/09/24	745.	828.	W	1.	-82.
	11 SH. SCHWAB STRATEGIC TR SHORT-TERM US TREAS	04/20/21	02/09/24	531.	564.			-33.
	1 SH. SCHWAB STRATEGIC TR SHORT-TERM US TREAS	09/02/21	02/09/24	48.	51.			-3.
	66.442 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	01/13/21	02/22/24	674.	750.			-76.
	1.653 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	02/01/21	02/22/24	17.	19.			-2.
	1.999 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	03/01/21	02/22/24	20.	23.			-3.
	1.652 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	04/01/21	02/22/24	19.	21.			-2.
	1.65 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	05/03/21	02/22/24	19.	21.			-2.
	1.783 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	06/01/21	02/22/24	18.	20.			-2.
	1.799 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	07/01/21	02/22/24	18.	20.			-2.
	1.584 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	08/02/21	02/22/24	16.	18.			-2.
	0.493 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	09/01/21	02/22/24	5.	6.			-1.
	5 SH. SCHWAB STRATEGIC TR SHORT-TERM US TREAS	09/02/21	02/22/24	241.	257.			-16.
	53.946 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	09/02/21	02/22/24	547.	609.			-62.
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).			2,918.	3,207.		1.	-288.

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.

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Social security number or taxpayer identification number

Stephanie R Silver

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.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	0.406 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	10/01/21	02/22/24	4.	5.			-1.
	0.418 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	11/01/21	02/22/24	4.	5.			-1.
	0.42 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	12/01/21	02/22/24	4.	5.			-1.
	0.624 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	12/08/21	02/22/24	6.	7.			-1.
	0.7 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	12/08/21	02/22/24	7.	8.			-1.
	0.417 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	01/03/22	02/22/24	4.	5.			-1.
	0.436 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	02/01/22	02/22/24	4.	5.			-1.
	0.489 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	03/01/22	02/22/24	5.	6.			-1.
	0.508 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	04/01/22	02/22/24	5.	6.			-1.
	0.592 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	05/02/22	02/22/24	6.	7.			-1.
	0.636 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	06/01/22	02/22/24	6.	7.			-1.
	0.704 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	07/01/22	02/22/24	7.	8.			-1.
	0.693 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	08/01/22	02/22/24	7.	8.			-1.
	0.708 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	09/01/22	02/22/24	7.	8.			-1.
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)				76.	90.			-14.

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.

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Social security number or taxpayer identification number

Stephanie R Silver

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	0.771 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	10/03/22	02/22/24	8.	9.			-1.
	0.776 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	11/01/22	02/22/24	8.	9.			-1.
	0.774 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	12/01/22	02/22/24	8.	9.			-1.
	0.016 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	12/08/22	02/22/24	0.	0.			0.
	0.771 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	01/03/23	02/22/24	8.	9.			-1.
	0.742 SH. **BLACKROCK MUNI BD FD INC NATIONAL MUNI	02/01/23	02/22/24	8.	8.			0.
	2.411 SH. **FIDELITY SALEM STR TR FIDELITY 500 IN	01/13/21	04/12/24	429.	335.			94.
	72.001 SH. **SIX CIRCLES TR U S UNCONSTRAINED EQU	01/13/21	04/12/24	1,159.	1,016.			143.
	4 SH. J P MORGAN EXCHANGE TRADED FD TR BETABO	01/26/21	04/12/24	227.	234.			-7.
	16.873 SH. **SIX CIRCLES TR INTL UNCONSTRAINED EQU	04/20/21	04/12/24	189.	174.			15.
	1 SH. J P MORGAN EXCHANGE TRADED FD TR BETABO	01/18/23	04/12/24	57.	53.			4.
	9.477 SH. **FIDELITY SALEM STR TR FIDELITY 500 IN	01/13/21	07/15/24	1,854.	1,320.			534.
	7 SH. J P MORGAN EXCHANGE TRADED FD TR BETABO	01/18/23	07/15/24	424.	369.			55.
	13.507 SH. **SIX CIRCLES TR U S UNCONSTRAINED EQU	01/13/21	10/01/24	244.	191.			53.
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).			4,623.	3,736.			887.

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.

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Social security number or taxpayer identification number

Stephanie R Silver

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	4,269 SH. **FIDELITY SALEM STR TR FIDELITY 500 IN	01/13/21	10/01/24	849.	605.			244.
	12,596 SH. **SIX CIRCLES TR U S UNCONSTRAINED EQUI	02/11/21	10/01/24	228.	178.			50.
	6 SH. J P MORGAN EXCHANGE TRADED FD TR BETABO	01/26/21	11/22/24	337.	352.			-15.
	8,319 SH. **SIX CIRCLES TR INTL UNCONSTRAINED BJO	04/20/21	11/22/24	92.	86.			6.
	76.17 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	06/08/22	11/22/24	686.	685.			1.
	0.595 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	06/30/22	11/22/24	5.	5.			0.
	2,444 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	07/14/22	11/22/24	22.	22.			0.
	0.93 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	07/29/22	11/22/24	8.	8.			0.
	0.985 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	08/31/22	11/22/24	9.	9.			0.
	1.11 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	09/30/22	11/22/24	10.	10.			0.
	10,495 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	10/11/22	11/22/24	94.	94.			0.
	6 SH. J P MORGAN EXCHANGE TRADED FD TR BETABO	01/18/23	11/22/24	341.	316.			25.
	41,904 SH. **JPMORGAN TR I NATIONAL MUNICIPAL INCM	06/24/20	01/31/24	420.	460.	W	1.	-39.
	9.26 SH. **BLACKROCK MUN BD FD INC NATIONAL MUNI	06/24/20	01/31/24	94.	102.	W	0.	-8.
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).			3,195.	2,932.		1.	264.

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

**Qualified Business Income Deduction
Simplified Computation**

OMB No. 1545-2294

2024Department of the Treasury
Internal Revenue Service

Attach to your tax return.

Go to www.irs.gov/Form8995 for instructions and the latest information.Attachment
Sequence No. **55**

Name(s) shown on return

Stephanie R Silver

Your taxpayer identification number

Note: You can claim the qualified business income deduction **only** if you have qualified business income from a qualified trade or business, real estate investment trust dividends, publicly traded partnership income, or a domestic production activities deduction passed through from an agricultural or horticultural cooperative. See instructions.

Use this form if your taxable income, before your qualified business income deduction, is at or below \$191,950 (\$383,900 if married filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i			
ii			
iii			
iv			
v			
2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)	2	
3	Qualified business net (loss) carryforward from the prior year	3 ()	
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-	4	
5	Qualified business income component. Multiply line 4 by 20% (0.20)		5
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions)	6 16.	
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7 ()	
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0-	8 16.	
9	REIT and PTP component. Multiply line 8 by 20% (0.20)		9 3.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9		10 3.
11	Taxable income before qualified business income deduction (see instructions)	11 157,627.	
12	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	12 2,385.	
13	Subtract line 12 from line 11. If zero or less, enter -0-	13 155,242.	
14	Income limitation. Multiply line 13 by 20% (0.20)		14 31,048.
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also enter this amount on the applicable line of your return (see instructions)		15 3.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-		16 (0.)
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-		17 (0.)

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

REV 02/22/25 Initial.og.dfp.sp

Form **8995** (2024)