

2025 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/18/2026

General Information

Name: Hon Scott Farley Mitchell

CONFIDENTIAL

PID 242070

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (4Th)	Elected Constitutional Officer	County Judge

Net Worth

My Net Worth as of December 31, 2025 was \$ 2,879,620.00.

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.

The aggregate value of my household goods and personal effect is \$ 178,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}	\$ 510,000.00
Charles Schwab Brokerage Account	\$ 1,927,000.00
TD bank cash	\$ 58,163.00
Principal Stock	\$ 8,750.00
Toyota Rav 4 2022	\$ 22,000.00
Toyota Corolla 2014	\$ 7,000.00
Drop Pension	\$ 219,000.00

Liabilities**LIABILITIES IN EXCESS OF \$1,000:**

Name of Creditor	Address of Creditor	Amount of Liability
Mr. Cooper Mortgage	P.O. Box 650783, Dallas TX 75265	\$ 48,100.00
Southeast Toyota Finance	P.O. Box 991817, Mobile, AL 36691	\$ 2,193.00

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 2025 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 2025 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.

Scott Farley Mitchell

Digitally signed: 06/18/2026

Filed with COE: 06/18/2026

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(T) MITCHELL, [REDACTED]
(S) MITCHELL, SCOTT F

Return Status : Pending Signatures

H&R Block
ADVANTAGE[®]
OFFICE NUMBER: 9395

CONFIDENTIAL CLIENT INFORMATION

TAXPAYER

[REDACTED] MITCHELL
Cell

BEST TIME TO CALL:

(T)SSN/DOB

E-MAIL ADDRESS:

FILING STATUS:

ONLINE RETURN:

FED EFILE SETTLEMENT:

STATE EFILE SETTLEMENT:

Anytime

MarriedFilingJointly
Tax Pro Review | Self Select PIN
IRS Bal Due | DirectDebit
See General

TAX PREPARER

Irina Pastors

TAX PREP START DATE: 04/01/2026

TAX PREP FINISH DATE: 04/01/2026

NEW or RETURNING: Returning

RETURNS PREPARED:

Federal 1040

State/City

E-SIGNED DOCUMENTS: No

Applied Refund Advance: NA

BLOCK FEES

RETURN PREP FEE : \$195.00

OTHER FEE(s) : \$55.00*

Total Fees: \$250.00

Amount Paid To Date \$250.00

Total Due \$0.00

GENERAL

ENTITY	ADJUSTED GROSS INCOME	TAXABLE INCOME	TAX LIABILITY	TOTAL PAYMENTS	REFUND / BALANCE DUE	SETTLEMENT OPTION
FEDERAL	753972	718855	124227	48891	-94717	IRS Bal Due DirectDebit

FORM W2 INFO: Federal

FORM W2 INFO: State

SOURCE	EIN	O	TYPE	FEDERAL		SS		MEDICARE		DEF COMP	ALLOC TIPS	DCB	EPHC	STATE	STATE		LOCAL	
				WAGES	W/H	WAGES	W/H	WAGES	W/H						WAGES	W/H	WAGES	W/H
Cronin Maxwell PL	208502511	T	R	25860	3468	25860	1603	25860	375				0	FL				
State of Florida	596001874	S	R	182247	26160	176100	10918	182247	2643				24352					
				-----	-----	-----	-----	-----	-----	-----	-----	-----	-----		-----	-----	-----	-----
				208107	29628	201960	12521	208107	3018	0	0	0	24352		0	0	0	0

Form 1099R

PAYER	OWNER	TYPE	CODE	GROSS AMNT	TAXABLE AMNT	FED TAXES W/H	STATE DIST	STATE TAXES W/H	LCL TAXES W/H
Pruco Life Insurance Co	T	I	7	9926	9926	1489	0	0	0
Pruco Life Insurance Co	S	P	7	4558	4558	456	0	0	0
PRUCO LIFE INSURANCE CO	S	P	7	52671	20883	0	0	0	0
Merrill Lynch	T	I	4	6375	6375	0	0	0	0
STATE STREET RETIREE SERVICES FOR ABA RETIREMENT FUNDS	T	P	G	198507	0	0	0	0	0
Canandaigua National Bank & Trust Co	T	I	4	3240	3240	0	0	0	0

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(T) MITCHELL, [REDACTED]
(S) MITCHELL, SCOTT F

4071 Mizner Court
Jacksonville, FL 32217

Return Status : Pending Signatures

H&R Block
ADVANTAGE®
OFFICE NUMBER: [REDACTED]

CONFIDENTIAL CLIENT INFORMATION

INTEREST

SOURCE	EIN	GROSS	EXEMPT	BACKUP W/H
CHARLES SCHWAB & COINC	941737782	978	1613	

DIVIDENDS

PAYER	OWNER	ORDINARY INCOME	QUALIFIED DIVIDENDS	CAPITAL GAINS	NON-TAXABLE	EXEMPT INCOME	NOMINEE DISTRIBUTIONS	BACKUP W/H
CHARLES SCHWAB COINC	Joint	24197	16990	190	193	235		
Canandaigua National Corporation	Taxpayer	490	490					
PRINCIPAL FINANCIAL GROUP INC	Spouse	308	308					
Canandaigua National Bank	Taxpayer	4110	2208		74			
Charles Schwab Co Inc	Joint	1536	660		3	58		
Canandaigua National Bank and Trust	Joint	745	578	14	6			

SS / RRB TIER 1 / UNEMPLOYMENT

OWNER	TOTAL SSA RECVD	FED TAX W/H	RRB TIER 1 BENEFITS RCVD	TOTAL UNEMPLOYMENT RECVD	FED TAX W/H	STATE TAX W/H
T	37807	8318	0	0	0	0

ESTIMATED PAYMENTS

ENTITY	AMNT APPLIED	AMOUNT DUE WITH FIRST PAYMENT	AMOUNT DUE WITH SECOND PAYMENT	AMOUNT DUE WITH THIRD PAYMENT	AMOUNT DUE WITH FOURTH PAYMENT	TOTAL
FEDERAL	0	2250	2250	2250	2250	9000

YOUR TAX PROFESSIONAL TODAY:

Irina Pastors
904-215-1986
1605 177 COUNTY RD 220
FLEMING ISLAND FL 32003

WE'RE OPEN YEAR-ROUND:

Call 904-215-1986
Visit hrblock.com/myblock.
Download the MyBlock App.

TAX PREP AND RELATED FEES:

Tax Preparation: \$195.00
Other Fee(s) : \$55.00
Total: \$0.00

WHAT YOU CAN EXPECT:

Federal Balance Due: (\$94,717.00)
Total Fees : \$0.00

* Please note this amount may come in multiple deposits depending on when the taxing authorities issues your refunds. This is not proof of payment of your fees. Your fees will be paid from your refund account pursuant to the terms of the RT Application and Agreement. Please note if you choose a State RT and your state refund arrives before your federal refund, your fees will be paid from your Refund Account at that time. If applicable your total will be reduced by any other payments you authorize from your refund, such as repayment for Refund Advance or if you owe certain debt.

WHAT YOU NEED TO KNOW:

To check the status of your return, visit hrblock.com/myreturnstatus or call 866-761-1040. You'll need your Social Security number and date of birth.

Refund: Federal and State refund timing varies. Delivery of your Federal refund may be delayed if the IRS selects your return for further review. The Department of Treasury Offset Program may offset your tax refund to pay delinquent federal student loans, child support or other debt. Call the Treasury Offset Program Call Center at 800-304-3107 if you have questions.

Balance Due: If you have a Federal balance due and did not make arrangements today to pay the full amount, go to DirectPay at IRS.gov or mail in a check to pay the remaining balance by April 15. If you pay by credit/debit card, payment processor will assess a convenience fee. No part of this service fee goes to H&R Block. If you selected an installment plan, visit IRS.gov to apply for an online payment agreement. If you have a State balance due and did not make arrangements today to pay the full amount, you can pay the remaining balance by credit/debit card or check. Follow state instructions to avoid additional penalties/fees.

Bank Account Information: The bank account that will be used for your federal refund and/or balance due is:
Routing Transit Number (RTN): 067014822 Deposit Account Number (DAN): 8601560605.
The direct debit is scheduled to be withdrawn from your bank account on 04/15/2026.

Extension: If you filed an extension, the original return must be filed by October 15. Any balance due must be paid by April 15 to avoid penalties/interest.

Married Filing Jointly	Tax Bracket
\$0 - \$23,850	10%
\$23,851 - \$96,950	12%
\$96,951 - \$206,700	22%
\$206,701 - \$394,600	24%
\$394,601 - \$501,050	32%
\$501,051 - \$751,600	35%
\$751,601 or greater	37%

~\$23,850 of your income was taxed at 10%
~\$73,100 of your income was taxed at 12%
~\$109,750 of your income was taxed at 22%
~\$187,900 of your income was taxed at 24%
~\$106,450 of your income was taxed at 32%
~\$217,805 of your income was taxed at 35%

Your effective tax rate is 17%
You paid \$141,919 in federal income taxes



Your Personalized Tax Tips

Reduce taxable income by saving for retirement

Maxing out your retirement plan contributions will make sure you're ready for what the future brings.

- **Why should I do this?** Retirement contributions can lower your tax bill, and allows you to take advantage of employer matching programs.
- **How Can I do this?** Talk with your employer about increasing your contributions. They can also fill you in on the pre-tax guidelines as well.

MyBlock App

The best way to safely store your most important info

- **Why should I do this?** Block can help you keep your tax documents stored safely, follow the status your return, and chat with your Tax Pro securely. Best of all, it's 100% free.
- **How Can I do this?** You can start downloading the app by visiting the Apple App Store or Google Play and searching, "MyBlock."



April 01, 2026

INVOICE



MITCHELL

Tax Prof Name:

Irina Pastors

Office Number:

9395

Need to contact us? Call (904) 215-1986

Your Current Returns Invoice

Description	Amount
Federal	\$195.00
Federal Tax Pro Review Fees	\$195.00
Products	\$55.00
Peace of Mind	\$29.00
Tax Identity Shield	\$26.00
Fee Subtotal	\$250.00
Total Fees	\$250.00

Invoice Summary

Sub Total	\$250.00
Sales Tax	\$0.00
Amount Paid to Date	(\$250.00)
Total Amount Due	\$0.00



2025 Federal Tax Return Filing
Instructions
FOR THE YEAR ENDING
December 31, 2025

Prepared for	[REDACTED] MITCHELL SCOTT F MITCHELL																	
Tax Summary	<table><tr><td>Gross Income.....</td><td>\$753972</td></tr><tr><td>Adjusted Gross Income.....</td><td>\$753972</td></tr><tr><td>Total Deductions.....</td><td>\$35117</td></tr><tr><td>Total Taxable Income.....</td><td>\$718855</td></tr><tr><td>Total Tax.....</td><td>\$141919</td></tr><tr><td>Total Payments.....</td><td>\$48891</td></tr><tr><td>Refund Amount.....</td><td>\$0</td></tr><tr><td>Amount You Owe.....</td><td>\$94717</td></tr></table>		Gross Income.....	\$753972	Adjusted Gross Income.....	\$753972	Total Deductions.....	\$35117	Total Taxable Income.....	\$718855	Total Tax.....	\$141919	Total Payments.....	\$48891	Refund Amount.....	\$0	Amount You Owe.....	\$94717
Gross Income.....	\$753972																	
Adjusted Gross Income.....	\$753972																	
Total Deductions.....	\$35117																	
Total Taxable Income.....	\$718855																	
Total Tax.....	\$141919																	
Total Payments.....	\$48891																	
Refund Amount.....	\$0																	
Amount You Owe.....	\$94717																	
Make check payable to																		
Mailing Address	Since you are filing your return electronically and you chose to use an electronic signature, you do not mail your return.																	

Instructions

If you e-filed your return and it has been accepted, you will get notified via text or email if you opted for that option.

You have a balance due, but elected to have it electronically withdrawn.

Keep a copy of your return and supporting documents for your records.

2026 INCOME TAX ESTIMATOR/PLANNER

SCOTT F MITCHELL

Keep for Your Records

	Current 2025	Adjustments 2026	Estimated 2026
Filing status	MFJ		MFJ
INCOME:			
Wages, salaries, tips, etc.	208,107		208,107
Interest income	3,158		3,158
Ordinary dividend income (excluding Qualified Dividends)	10,152		10,152
IRA distributions and pension income	44,982		44,982
Taxable social security income	32,136		32,136
Capital gain or (loss) (Schedule D) (including Qual Dividends)	455,437		455,437
Schedule 1 Income			
Refunds of state and local taxes			
Alimony received from divorces finalized before 1/1/2025			
Business income or (loss) (Schedule C)			
Other gains or (losses) (Form 4797)			
Rental real estate, partnerships, estates, etc. (Schedule E)			
Farm income or (loss) (Schedule F)			
Unemployment compensation			
Other income			
Total income	753,972		753,972
ADDITIONAL DEDUCTIONS:			
Qualified tips deduction			
Qualified overtime compensation deduction			
Qualified vehicle loan interest deduction			
Senior deduction			
ADJUSTMENTS:			
Schedule 1 Adjustments			
Educator expenses			
Certain business expenses of reservists, performing artist, and fee-basis government officials			
Health savings account deduction (Form 8889)			
Qualified moving expenses			
Deductible part of self-employment tax (Schedule SE)			
Self-employed SEP, SIMPLE and qualified plans deduction			
Self-employed health insurance			
Penalty on early withdrawal of savings			
Alimony paid on divorces finalized before 1/1/2025			
IRA deduction			
Student loan interest deduction			
Archer MSA deduction			
Other adjustments			
Total adjustments			
ADJUSTED GROSS INCOME:	753,972		753,972
DEDUCTIONS:			
Standard deduction	34,700	800	35,500
Itemized deductions:			
Medical and dental expenses			
Sales, income, and other taxes paid	6,681		6,681
Interest paid	2,577		2,577
Gifts to charity	5,000		5,000
Casualty and theft losses			
Other miscellaneous deductions			
Total itemized deductions	14,258		14,258
Deduction actually claimed	34,700	800	35,500
Qualified business income deduction	417		417

2026 INCOME TAX ESTIMATOR/PLANNER

SCOTT F MITCHELL

Keep for Your Records

	Current 2025	Adjustments 2026	Estimated 2026
TAX COMPUTATION (BEFORE CREDITS):			
Taxable income	718,855	-800	718,055
Tax	124,227	64,631	188,858
Schedule 2 - Taxes			
Additions to Tax			
Alternative minimum tax			
Tax rate	35.00%		37.00%
CREDITS:			
Child and other dependents tax credit			
Schedule 3 - Nonrefundable Credits			
Foreign tax credit	120		120
Child care credit			
Education credit			
Retirement savings contribution credit			
Other credits			
Total credits	120		120
OTHER TAXES:			
Schedule 2 - Other Taxes			
Self-employment tax			
Additional tax on IRAs			
Other taxes	17,812		17,812
Total other taxes	17,812		17,812
PAYMENTS:			
Federal income tax withheld	39,891		39,891
Estimated payments	9,000		9,000
Earned income credit			
Additional child tax credit			
Schedule 3 - Refundable Credits and Payments			
American opportunity credit			
ACA premium tax credit			
Other payments			
Total payments	48,891		48,891
AMOUNT DUE / REFUND:			
Amount overpaid			
Overpayment applied to next year			
Refund			
Amount due	93,028	64,631	157,659

Note: These amounts and calculations are for estimating purposes only and should not be assumed to be your final refund or liability for 2025 taxes. State implications have not been considered in these calculations. Be sure to schedule a tax appointment to have your 2025 tax return prepared using the actual 2025 tax forms issued by the Internal Revenue Service and your actual 2025 source documents.

ADDITIONAL DISCLOSURES:

Subject to an adjusted withholding entry, the 2025 withholding is being used to calculate the 2026 estimated tax refund or balance Due. Beginning in January 2020 the IRS has changed the way W4 should be prepared reporting extra income, deductions and credits rather than exemption counts. These changes might cause some change in withholding. Advise client that employers may require a new W4 be filed under the new format.

The mortgage interest deduction for any qualified residence acquired after December 15, 2017 is limited to interest on the first \$750,000 (\$375,000 for MFS) of the mortgage. Loans financed before that date are (See attached)

2026 INCOME TAX ESTIMATOR/PLANNER

SCOTT F MITCHELL

Keep for Your Records

ADDITIONAL DISCLOSURES:

still subject to the \$1,000,000 (\$500,000) limit from prior law. For tax years after 2022 home equity debt will no longer be deductible as qualified residence interest.

Standard deduction limits increased to \$32,200 for MFJ and QSS filers \$24,150 for head of household (HOH) filers \$16,100 single

The State and local tax deduction is limited to \$10,000 (\$5,000 MFS)

The Income Tax Estimator/Planner does not dynamically recalculate the amount of Taxable Social Security income when other sources of income are adjusted for the selected tax year. Users should be aware that changes to other income may affect the taxable portion of Social Security benefits, which is not reflected in the current estimation.

2025 TWO YEAR COMPARISON

SCOTT F MITCHELL

Keep for Your Records

	2025	2024	Difference
Filing status	MFJ	MFJ	
INCOME:			
Wages, salaries, tips, etc.	208,107	275,682	-67,575
Interest income	3,158	3,042	116
Ordinary dividend income	31,386	23,838	7,548
IRA distributions and pension income	44,982	14,484	30,498
Taxable social security income	32,136	31,059	1,077
Capital gain or (loss) (Schedule D)	434,203	345	433,858
Schedule 1 - Income			
Refunds of state and local taxes			
Alimony received			
Business income or (loss) (Schedule C)			
Other gains or (losses) (Form 4797)			
Rental real estate, partnerships, estates, etc. (Schedule E)			
Farm income or (loss) (Schedule F)			
Unemployment compensation			
Other income			
Total income	753,972	348,450	405,522
ADJUSTMENTS:			
Schedule 1 - Adjustments			
Educator expenses			
Busn expenses for reservists, performing artists, etc			
Health savings account deduction			
Moving expenses			
Deductible part of self-employment tax			
Self-employed SEP, SIMPLE and qualified plans deduction			
Self-employed health insurance			
Penalty on early withdrawal of savings			
Alimony paid			
IRA contributions			
Student loan interest deduction			
Archer MSA deduction			
Other adjustments			
Total adjustments			
ADJUSTED GROSS INCOME:	753,972	348,450	405,522
DEDUCTIONS:			
Standard deduction or Itemized deductions	34,700	32,300	2,400
Charitable contributions if taking standard deduction	N/A		
If itemized, Schedule A deductions:			
Medical and dental expenses			
Sales, income, and other taxes paid	6,681		6,681
Interest paid	2,577		2,577
Gifts to charity	5,000		5,000
Casualty and theft losses			
Other miscellaneous deductions			
Qualified business income deduction	417	334	83
Schedule 1-A Additional deductions			
Qualified tips deduction			
Qualified overtime compensation deduction			
Qualified passenger vehicle loan interest deduction			
Enhanced deduction for seniors			
TAXABLE INCOME:	718,855	315,816	403,039

2025 TWO YEAR COMPARISON

SCOTT F MITCHELL

Keep for Your Records

	2025	2024	Difference
TAX COMPUTATION (BEFORE CREDITS):			
Tax	124,227	60,298	63,929
Tax calculation method	SCH D	QDCGTW	
Schedule 2 - Taxes			
Additions to Tax			
Alternative minimum tax			
Total taxes	124,227	60,298	63,929
Tax rate	35%	24%	
CREDITS:			
Child and other dependents tax credit			
Schedule 3 - Non-Refundable Credits			
Foreign tax credit	120	68	52
Child care credit			
Education credit			
Retirement savings contribution credit			
Other credits			
Total credits	120	68	52
OTHER TAXES:			
Schedule 2 - Other Taxes			
Self-employment tax			
Additional tax on IRAs			
Other taxes	17,812	1,355	16,457
TOTAL TAXES:	141,919	61,585	80,334
PAYMENTS:			
Federal income tax withheld	39,891	52,894	-13,003
Estimated payments made	9,000	10,000	-1,000
Earned income credit			
Refundable child tax credit or additional child tax credit			
American opportunity credit			
Schedule 3 - Refundable Credits & Payments			
ACA premium tax credit			
Qualified sick and family leave credit			
Other payments			
Total payments	48,891	62,894	-14,003
AMOUNT DUE / REFUND:			
Amount overpaid		1,309	-1,309
Overpayment applied to next year			
Refund		1,309	-1,309
Amount due	94,717		94,717
Penalty	1,689		1,689

Tax Calculation Methods:

Sch D = Sch D tax worksheet

Sch J = Inc Aver for Farmer/Fisherman

FEITW = Foreign Earned Income Tax WS

QDCGTW = Qual Div Cap Gain Tax WS
F8615 = Child with unearned income

TCW = Tax Comp Worksheet (rates)
TABLE = Tax Table

For the year Jan. 1-Dec. 31, 2025, or other tax year beginning _____, 2025, ending _____, 20 ____ See separate instructions.

☐ Filed pursuant to section 301.9100-2	☐ Combat zone	☐ Deceased	☐ Spouse
☐ Other			

Your first name and middle initial _____ Last name **MITCHELL** Your social security number _____

If joint return, spouse's first name and middle initial **SCOTT F** Last name **MITCHELL** Spouse's social security number _____

Home address (number and street). If you have a P.O. box, see instructions. _____ Apt. no. _____ Check here if your main home, and your spouse's if filing a joint return, was in the U.S. for more than half of 2025. ☒

City, town, or post office. If you have a foreign address, also complete spaces below. State _____ ZIP 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

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

Filing Status Check only one box.
☐ Single
☒ Married filing jointly (even if only one had income)
☐ Married filing separately (MFS). Enter spouse's SSN above and full name here: _____
☐ Head of household (HOH)
☐ Qualifying surviving spouse (QSS) 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 2025, 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

Dependents (see inst.)	Dependent 1	Dependent 2	Dependent 3	Dependent 4
(1) First name				
(2) Last name				
(3) SSN				
(4) Relationship				
(5) Check if lived with you more than half of 2025 ☐	(a) ☐ yes (b) ☐ And in the U.S.	(a) ☐ yes (b) ☐ And in the U.S.	(a) ☐ yes (b) ☐ And in the U.S.	(a) ☐ yes (b) ☐ And in the U.S.
(6) Check if	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled
(7) Credits	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents

☐ Check if your filing status is MFS or HOH and you lived apart from your spouse for the last 6 months of 2025, or you are legally separated according to your state law under a written separation agreement or a decree of separate maintenance and you did not live in the same household as your spouse at the end of 2025.

Income	1a Total amount from Form(s) W-2, box 1 (see instructions)	1a 208,107
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.	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 31	1f
	g Wages from Form 8919, line 6	1g
	h Other earned income (see instructions). Enter type and amount:	1h
	i Nontaxable combat pay election (see instructions) 1i	
	z Add lines 1a through 1h	1z 208,107

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

Form **1040-SR** (2025) Created 9/5/25

Attach Sch. B if required.	2a Tax-exempt interest	2a	1,906	b Taxable interest	2b	3,158
	3a Qualified dividends	3a	21,234	b Ordinary dividends	3b	31,386
c Check if your child's dividends are included in:						
1 ☐ Line 3a		2 ☐ Line 3b				
	4a IRA distributions	4a		b Taxable amount	4b	19,541
c Check if (see instructions):						
1 ☐ Rollover		2 ☐ QCD		3 ☐		
	5a Pensions and annuities	5a	255,736	b Taxable amount	5b	25,441
c Check if (see instructions):						
1 ☒ Rollover		2 ☐ PSO		3 ☐		
	6a Social security benefits	6a	37,807	b Taxable amount	6b	32,136
c If you elect to use the lump-sum election method, check here (see instructions)						
d If you are married filing separately and lived apart from your spouse the entire year (see inst.), check here						
	7a Capital gain or (loss). Attach Schedule D if required	7a				434,203
b Check if: ☐ Schedule D not required						
☐ Includes child's capital gain or (loss)						
	8 Additional income from Schedule 1, line 10	8				
	9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7a, and 8. This is your total income	9				753,972
	10 Adjustments to income from Schedule 1, line 26	10				
	11a Subtract line 10 from line 9. This is your adjusted gross income	11a				753,972
Tax and Credits	b Amount from line 11a (adjusted gross income)	11b				753,972
	12a Someone can claim ☐ You as a dependent ☐ Your spouse as a dependent					
b ☐ Spouse itemizes on a separate return		c ☐ You were a dual-status alien				
d You: ☒ Were born before January 2, 1961 ☐ Are blind						
Spouse: ☒ Was born before January 2, 1961 ☐ Is blind						
Standard Deduction	e Standard deduction or itemized deductions (from Schedule A)	12e				34,700
	13a Qualified business income deduction from Form 8995 or Form 8995-A	13a				417
b Additional deductions from Schedule 1-A, line 38						
	14 Add lines 12e, 13a, and 13b	14				35,117
	15 Subtract line 14 from line 11b. If zero or less, enter -0-. This is your taxable income	15				718,855
	16 Tax (see instructions). Check if any from:	16				124,227
1 ☐ Form(s) 8814		2 ☐ Form(s) 4972		3 ☐		
	17 Amount from Schedule 2, line 3	17				
	18 Add lines 16 and 17	18				124,227
	19 Child tax credit or credit for other dependents from Schedule 8812	19				
	20 Amount from Schedule 3, line 8	20				120
	21 Add lines 19 and 20	21				120
	22 Subtract line 21 from line 18. If zero or less, enter -0-	22				124,107
	23 Other taxes, including self-employment tax, from Schedule 2, line 21	23				17,812
	24 Add lines 22 and 23. This is your total tax	24				141,919

Go to www.irs.gov/Form1040SR for instructions and the latest information.

Form 1040-SR (2025)

Payments and Refundable Credits	25	Federal income tax withheld from:		
	a	Form(s) W-2.....	25a	29,628
	b	Form(s) 1099.....	25b	10,263
	c	Other forms (see instructions).....	25c	
	d	Add lines 25a through 25c.....	25d	39,891
	26	2025 estimated tax payments and amount applied from 2024 return.....	26	9,000
		If you made estimated tax payments with your former spouse in 2025, enter their SSN (see instructions):		
Refund	27a	Earned income credit (EIC).....	27a	
	b	Clergy filing Schedule SE (see instructions).....		
	c	If you do not want to claim the EIC, check here.....		
	28	Additional child tax credit (ACTC) from Schedule 8812. If you do not want to claim the ACTC, check here.....	28	
	29	American opportunity credit from Form 8863, line 8.....	29	
	30	Refundable adoption credit from Form 8839, line 13.....	30	
	31	Amount from Schedule 3, line 15.....	31	
	32	Add lines 27a, 28, 29, 30, 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	48,891
		34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here.....	35a	
	b	Routing number XXXXXXXXXXXXXXXXXXXX	c	Type: ☐ Checking ☐ Savings
	d	Account number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
	36	Amount of line 34 you want applied to your 2026 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	94,717
	38	Estimated tax penalty (see instructions).....	38	1,689

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)	
	HRB TAX GROUP INC	904-284-5754	[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.			
	Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
	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.)
	[REDACTED]	[REDACTED]	Judge	[REDACTED]
	Phone no.	Email address	[REDACTED]	

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if:
	Irina Pastors	[REDACTED]	04-01-2026	P02407555	☐ Self-employed
	Firm's name	Firm's address			Phone no.
	HRB TAX GROUP INC	1605 177 COUNTY RD 220 FLEMING ISLAND FL 32003			904-215-1986
	Firm's EIN			431871840	

Go to www.irs.gov/Form1040SR for instructions and the latest information.Form **1040-SR** (2025)

Standard Deduction Chart*

Add the number of boxes checked on line 12d on page 2 2

IF your filing status is...	AND the number of boxes checked is...	THEN your standard deduction is...
Single	1	\$17,750
	2	19,750
Married filing jointly	1	\$33,100
	2	34,700
	3	36,300
	4	37,900
Qualifying surviving spouse	1	\$33,100
	2	34,700
Head of household	1	\$25,625
	2	27,625
Married filing separately**	1	\$17,350
	2	18,950
	3	20,550
	4	22,150

*Don't use this chart if someone can claim you (or your spouse if filing jointly) as a dependent, your spouse itemizes on a separate return, or you were a dual-status alien. Instead, see instructions.

**You can check the boxes for your spouse if your filing status is married filing separately and your spouse had no income, isn't filing a return, and can't be claimed as a dependent on another person's return.

Go to www.irs.gov/Form1040SR for instructions and the latest information.

Form 1040-SR (2025)

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

2025Attachment
Sequence No. **02**

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

& SCOTT F MITCHELL

Your social security number

Part I Tax

1	Additions to tax:			
a	Excess advance premium tax credit repayment. Attach Form 8962	1a		
b	Repayment of new clean vehicle credits(s) transferred to a registered dealer from Schedule A (Form 8936), Part II. Attach Form 8936 and Schedule A (Form 8936)	1b		
c	Repayment of previously owned clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part IV. Attach Form 8936 and Schedule A (Form 8936)	1c		
d	Recapture of net EPE from Form 4255, line 2a, column (I)	1d		
e	Excessive payments (EPs) on gross EPE from Form 4255. Check applicable box and enter amount. See instructions. (i) ☐ Line 1a (ii) ☐ Line 1c (iii) ☐ Line 1d (iv) ☐ Line 2a	1e		
f	20% EP from Form 4255. Check applicable box and enter amount. See instructions. (i) ☐ Line 1a (ii) ☐ Line 1c (iii) ☐ Line 1d (iv) ☐ Line 2a	1f		
y	Other additions to tax (see instructions):	1y		
z	Add lines 1a through 1y	1z		
2	Alternative minimum tax. Attach Form 6251	2		
3	Add lines 1z 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. Check if any exemption from (see instructions): 1 ☐ 4361 2 ☐ 4029 3 ☐	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐	8	
9	Household employment taxes. Attach Schedule H	9	
10	Reserved for future use	10	
11	Additional Medicare Tax. Attach Form 8959	11	
12	Net investment income tax. Attach Form 8960	12	17,812
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2025 Created 5/8/25

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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, 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 a section 1291 fund	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	Recapture of net EPE from Form 4255, line 1d, column (I)	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	17,812

Schedule 2 (Form 1040) 2025

SCHEDULE 3

(Form 1040)

Additional Credits and Payments

OMB No. 1545-0074

2025Attachment
Sequence No. **03**Department of the Treasury
Internal Revenue Service

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

Go to www.irs.gov/Form1040 for instructions and the latest information.

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

SCOTT F MITCHELL

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	120
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	120

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.

Schedule 3 (Form 1040) 2025 Created 11/17/25

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****DO NOT FILE****
**Underpayment of Estimated Tax by
Individuals, Estates, and Trusts**

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

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

Name(s) shown on tax return

& SCOTT F MITCHELL

Identifying number

Do You Have To File Form 2210?

Complete lines 1 through 7 below. Is line 4 or line 7 less than \$1,000?	Yes	Don't file Form 2210. You don't owe a penalty.
No		
Complete lines 8 and 9 below. Is line 6 equal to or more than line 9?	Yes	You don't owe a penalty. Don't file Form 2210 unless box E in Part II applies, then file page 1 of Form 2210.
No		
You may owe a penalty. Does any box in Part II below apply?	Yes	You must file Form 2210. Does box B, C, or D in Part II apply?
No		
	No	You aren't required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III as a worksheet and enter your penalty amount on your tax return, but file only page 1 of Form 2210 .
	Yes	You must figure your penalty.
Don't file Form 2210. You aren't required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III as a worksheet and enter your penalty amount on your tax return, but don't file Form 2210 .		

Part I Required Annual Payment

1	Enter your 2025 tax after credits from Form 1040, 1040-SR, or 1040-NR, line 22. (See the instructions if not filing Form 1040.)	1	124,107
2	Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	17,812
3	Other payments and refundable credits (see instructions)	3	()
4	Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop ; you don't owe a penalty. Don't file Form 2210	4	141,919
5	Multiply line 4 by 90% (0.90)	5	127,727
6	Withholding taxes. Don't include estimated tax payments. See instructions	6	39,891
7	Subtract line 6 from line 4. If less than \$1,000, stop ; you don't owe a penalty. Don't file Form 2210	7	102,028
8	Maximum required annual payment based on prior year's tax (see instructions)	8	67,744
9	Required annual payment. Enter the smaller of line 5 or line 8	9	67,744

Next: Is line 9 more than line 6?

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

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

- A ☐ You request a **waiver** (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you aren't required to figure your penalty.
- B ☐ You request a **waiver** (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C ☐ Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D ☐ Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E ☐ You filed or are filing a joint return for either 2024 or 2025, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you **aren't** required to figure your penalty (unless box B, C, or D applies).

For Paperwork Reduction Act Notice, see separate instructions.

Form 2210 (2025) Created 10/21/25

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

Section A – Figure Your Underpayment		Payment Due Dates			
		(a) 4/15/25	(b) 6/15/25	(c) 9/15/25	(d) 1/15/26
10 Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 27. Otherwise, enter 25% (0.25) of line 9, Form 2210, in each column. For fiscal year filers, see instructions	10	16,936	16,936	16,936	16,936
11 Estimated tax paid and tax withheld (see the instructions). For column (a) only, also enter the amount from line 11 on line 15, column (a). If line 11 is equal to or more than line 10 for all payment periods, stop here; you don't owe a penalty. Don't file Form 2210 unless you checked a box in Part II.	11	12,223	12,223	12,223	12,222

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

12 Enter the amount, if any, from line 18 in the previous column.	12				
13 Add lines 11 and 12	13		12,223	12,223	12,222
14 Add the amounts on lines 16 and 17 in the previous column.	14		4,713	9,426	14,139
15 Subtract line 14 from line 13. If zero or less, enter -0-. For column (a) only, enter the amount from line 11	15	12,223	7,510	2,797	0
16 If line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-	16		0	0	
17 Underpayment. If line 10 is equal to or more than line 15, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18	17	4,713	9,426	14,139	16,936
18 Overpayment. If line 15 is more than line 10, subtract line 10 from line 15. Then go to line 12 of the next column	18				

Section B – Figure the Penalty (Use the Worksheet for Form 2210, Part III, Section B -- Figure the Penalty in the instructions.)

19 Penalty. Enter the total penalty from line 14 of the Worksheet for Form 2210, Part III, Section B -- Figure the Penalty. Include this amount on Form 1040, 1040-SR, or 1040-NR, line 38; or Form 1041, line 27. Don't file Form 2210 unless you checked a box in Part II.	19	1,689
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Form **2210** (2025)

SCHEDULE B
(Form 1040)

Department of the Treasury
Internal Revenue Service

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

2025

Attachment

Sequence No. **08**

Name(s) shown on return

SCOTT F MITCHELL

Your social security no.

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:

CHARLES SCHWAB & COINC
ABP ADJUSTMENT OID

Amount

3,416
-258

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.

3,158

3

- 4** Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b.

3,158

4

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

Amount

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:
CHARLES SCHWAB COINC
Canandaigua National Corporation
PRINCIPAL FINANCIAL GROUP INC
Canandaigua National Bank
Charles Schwab Co Inc
Canandaigua National Bank and Trust
SUBTOTAL

24,197
490
308
4,110
1,536
745
31,386

5

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

31,386

6

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.

Yes No

- 7a** At any time during 2025, 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, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:

- 8** During 2025, 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

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

Schedule B (Form 1040) 2025 Created 4/23/25

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

2025Attachment
Sequence No. **12**

Name(s) shown on return

SCOTT F MITCHELL

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 or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see inst.). 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 or Box G checked	122,102	118,592		3,510
2 Totals for all transactions reported on Form(s) 8949 with Box B or Box H checked	216,487	208,353	5	8,139
3 Totals for all transactions reported on Form(s) 8949 with Box C or Box I 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 11,649

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 or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see inst.). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.	39,994	41,657		-1,663
8b Totals for all transactions reported on Form(s) 8949 with Box D or Box J checked	795,402	397,117	-114	398,171
9 Totals for all transactions reported on Form(s) 8949 with Box E or Box K checked	135,983	110,141		25,842
10 Totals for all transactions reported on Form(s) 8949 with Box F or Box L 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				13 204
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.				15 422,554

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

Schedule D (Form 1040) 2025 Created 10/6/25

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	434,203
● If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7a. 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 7a. 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	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	90
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 7a, the smaller of: ● The loss on line 16; or ● (\$3,000), or if married filing separately, (\$1,500)	21	()
Note: When figuring which amount is smaller, treat both amounts as positive numbers.			
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

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.2025
Attachment
Sequence No. 12A

Name(s) shown on return

SSN or taxpayer identification number

& SCOTT F MITCHELL

Before you check Box A, B, C, G, H, or I below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, C, G, H, or I 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 was not reported to the IRS
☐ (C) Short-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
☐ (G) Short-term transactions reported on Form(s) 1099-DA showing basis was reported to the IRS (see Note above)
☐ (H) Short-term transactions reported on Form(s) 1099-DA showing basis was not reported to the IRS
☐ (I) Short-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB		12-31-25	153	154	M		-1
	SCHWAB		12-31-25	121,949	118,438	M		3,511
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if Box A or Box G above is checked), line 2 (if Box B or Box H above is checked), or line 3 (if Box C or Box I above is checked) -				122,102	118,592		0	3,510

Note: If you checked Box A or Box G 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.

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

Form 8949 (2025) Created 5/5/25

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

SCOTT F MITCHELL

Before you check Box D, E, F, J, K, or L below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, F, J, K, or L 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 **was not** reported to the IRS
- ☐ (F) Long-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (J) Long-term transactions reported on Form(s) 1099-DA showing basis **was** reported to the IRS (see **Note** above)
- ☐ (K) Long-term transactions reported on Form(s) 1099-DA showing basis **was not** reported to the IRS
- ☐ (L) Long-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB	08-23-93	12-18-25	31,751	421			31,330
	SCHWAB	VARIOUS	12-05-25	104,195	109,695			-5,500
	CANANDAIGUA N	11-13-09	08-05-25	37	25			12
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 8b (if Box D or Box J above is checked), line 9 (if Box E or Box K above is checked), or line 10 (if Box F or Box L above is checked).				135,983	110,141			25,842

Note: If you checked Box D or Box J 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.

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

SCOTT F MITCHELL

SSN or taxpayer identification number

Before you check Box A, B, C, G, H, or I below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, C, G, H, or I 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 **was not** reported to the IRS
- ☐ (C) Short-term transactions, other than digital asset transactions, not reported to you on **Form 1099-B** or **Form 1099-DA**
- ☐ (G) Short-term transactions reported on **Form(s) 1099-DA** showing basis **was** reported to the IRS (see **Note** above)
- ☐ (H) Short-term transactions reported on **Form(s) 1099-DA** showing basis **was not** reported to the IRS
- ☐ (I) Short-term digital asset transactions not reported to you on **Form 1099-DA** or **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	
	SCHWAB		12-31-25	216,487	208,353	M	5	8,139
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if Box A or Box G above is checked), line 2 (if Box B or Box H above is checked), or line 3 (if Box C or Box I above is checked) -				216,487	208,353		5	8,139

Note: If you checked Box A or Box G 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.

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

Form **8949** (2025) Created 5/5/25

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

SSN or taxpayer identification number

SCOTT F MITCHELL

Before you check Box D, E, F, J, K, or L below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, F, J, K, or L 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 **was not** reported to the IRS
- ☐ (F) Long-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (J) Long-term transactions reported on Form(s) 1099-DA showing basis **was** reported to the IRS (see **Note** above)
- ☐ (K) Long-term transactions reported on Form(s) 1099-DA showing basis **was not** reported to the IRS
- ☐ (L) Long-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB			636,409	226,387	MW	-114	409,908
	CANANDAIGUA		12-31-25	158,993	170,730	M		-11,737
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 8b (if Box D or Box J above is checked), line 9 (if Box E or Box K above is checked), or line 10 (if Box F or Box L above is checked).			795,402	397,117		-114	398,171

Note: If you checked Box D or Box J 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

Department of the Treasury
Internal Revenue Service

Attach to your tax return.

Go to www.irs.gov/Form8995A for instructions and the latest information.2025
Attachment
Sequence No. 55A

Name(s) shown on return

Your taxpayer identification number

SCOTT F MITCHELL

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 above \$197,300 (\$394,600 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		☐	☐		☐
B		☐	☐		☐
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 Multiply line 2 by 20% (0.20). If your taxable income is \$197,300 or less (\$394,600 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	3		
4 Allocable share of W-2 wages from the trade, business, or aggregation	4		
5 Multiply line 4 by 50% (0.50)	5		
6 Multiply line 4 by 25% (0.25)	6		
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	7		
8 Multiply line 7 by 2.5% (0.025)	8		
9 Add lines 6 and 8	9		
10 Enter the greater of line 5 or line 9	10		
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	11		
12 Phased-in reduction. Enter the amount from line 26, if any	12		
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	13		
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		
16 Total qualified business income component. Add all amounts reported on line 15	16		

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

Form 8995-A (2025) Created 9/12/25

Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$197,300 but not \$247,300 (\$394,600 and \$494,600 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		
18	Enter the amounts from line 10	18		
19	Subtract line 18 from line 17	19		
20	Taxable income before qualified business income deduction	20		
21	Threshold. Enter \$197,300 (\$394,600 if married filing jointly)	21		
22	Subtract line 21 from line 20	22		
23	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	23		
24	Phase-in percentage. Divide line 22 by line 23	24	%	
25	Total phase-in reduction. Multiply line 19 by line 24	25		
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		

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		
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions	28	2,083	
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	2,083	
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	417	
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		417
33	Taxable income before qualified business income deduction	33	719,272	
34	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	34	443,788	
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		275,484
36	Income limitation. Multiply line 35 by 20% (0.20)	36		55,097
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		417
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		417
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40	()	0

Net Investment Income Tax-- Individuals, Estates, and Trusts

OMB No. 1545-2227

2025

Attachment
Sequence No. 72Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on your tax return

Your social security number or EIN

SCOTT F MITCHELL

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	3,158
2	Ordinary dividends (see instructions)	2	31,386
3	Annuities (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions)	4a	
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	
5a	Net gain or loss from disposition of property (see instructions)	5a	434,203
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	434,203
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	468,747

Part II Investment Expenses Allocable to Investment Income and Modifications

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

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13-17. Estates and trusts, complete lines 18a-21. If zero or less, enter -0-	12	468,747
Individuals:			
13	Modified adjusted gross income (see instructions)	13	753,972
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	503,972
16	Enter the smaller of line 12 or line 15	16	468,747
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	17,812
Estates and Trusts:			
18a	Net investment income (line 12 above)	18a	
b	Deductions for distributions of net investment income and charitable deductions (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	

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

Form 8960 (2025) Created 8/19/25

IRS e-file Signature Authorization

CLIENT COPY

OMB No. 1545-0074

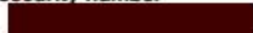
► ERO must obtain and retain completed Form 8879.
► Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) 

Taxpayer's name

 MITCHELL

Social security number



Spouse's name

SCOTT F MITCHELL

Spouse's social security number

**Part I Tax Return Information -- Tax Year Ending December 31, 2025** (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	1	753,972
2	Total tax	2	141,919
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3	39,891
4	Amount you want refunded to you	4	
5	Amount you owe	5	94,717

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

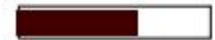
Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☒ I authorize HRB TAX GROUP INC to enter or generate my PIN  as my signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► SIGNATURE AND DATE ON FILEDate ► 04-01-2026**Spouse's PIN: check one box only**

☒ I authorize HRB TAX GROUP INC to enter or generate my PIN  as my signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► SIGNATURE AND DATE ON FILEDate ► 04-01-2026**Practitioner PIN Method Returns Only -- continue below****Part III Certification and Authentication -- Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.



Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ►

Date ► 04-01-2026

ERO Must Retain This Form -- See Instructions
Don't Submit This Form to the IRS Unless Requested To Do So

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

Form 8879 (Rev. 01-2021)

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.
▶ Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

Submission Identification Number (SID) ▶

Taxpayer's name

MITCHELL

Social security number

Spouse's name

SCOTT F MITCHELL

Spouse's social security number

Part I Tax Return Information -- Tax Year Ending December 31, 2025 (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	1	753,972
2	Total tax	2	141,919
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3	39,891
4	Amount you want refunded to you	4	
5	Amount you owe	5	94,717

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

- ☒ I authorize HRB TAX GROUP INC to enter or generate my PIN as my
ERO firm name
signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros
- ☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only**
if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶

Date ▶

Spouse's PIN: check one box only

- ☒ I authorize HRB TAX GROUP INC to enter or generate my PIN as my
ERO firm name
signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros
- ☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only**
if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III

Spouse's signature ▶

Date ▶

Practitioner PIN Method Returns Only -- continue below**Part III Certification and Authentication -- Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.

Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ▶

Date ▶ 04-01-2026

ERO Must Retain This Form -- See Instructions
Don't Submit This Form to the IRS Unless Requested To Do So

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

Form 8879 (Rev. 01-2021)

2025 WAGES AND SALARIES SUMMARY ATTACHMENT

& SCOTT F MITCHELL

Employer Name	Employer EIN	T or S	Wages	Federal Withholding	Social Security Tax Withheld	State	State Wages	State Tax Withheld	Local Tax Withheld
Cronin Maxwell PL	20-8502511	T	25,860	3,468	1,603	FL			
State of Florida	59-6001874	S	182,247	26,160	10,918				

Total 208,107 29,628 12,521

2025 PENSIONS AND ANNUITIES SUMMARY ATTACHMENT

& SCOTT F MITCHELL

Payer Name	Payer's Federal EIN	T or S	Pension Amount	Taxable Amount	Capital Gain Incl in Box 2a	Federal Tax Withheld	Distrib Code	IRA / SEP / SMPL	State	State Tax Withheld	Local Tax Withheld
Pruco Life Insurance	22-1944557	T	9,926	9,926		1,489	7	X			
Pruco Life Insurance	22-1944557	S	4,558	4,558		456	7				
PRUCO LIFE INSURANCE	22-1944557	S	52,671	20,883			7				
Merrill Lynch	13-3180817	T	6,375	6,375			4	X			
STATE STREET RETIREE	04-3581074	T	198,507	**			G				
Canandaigua National	16-1495122	T	3,240	3,240			4	X			

TOTAL 1099RS

275,277

44,982

1,945

2025 FEDERAL TAX WITHHOLDINGS ATTACHMENT

& SCOTT F MITCHELL

W-2	Cronin Maxwell PL	3,468
W-2	State of Florida	26,160
1099R	Pruco Life Insurance Co	1,489
1099R	Pruco Life Insurance Co	456
1099-SSA	TP WITHHOLDINGS	8,318

Total to Form 1040/1040-SR line 25d	39,891
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2025 SOCIAL SECURITY TAXABLE BENEFITS WORKSHEET

& SCOTT F MITCHELL

Keep for Your Records
Publication 915

- Before you begin:**
- ✓ If the instructions for Schedule 1, line 24z, have you enter a write-in adjustment on line 24z, figure that write-in before completing this worksheet (see the instructions for Schedule 1, line 24z).
 - ✓ If you are married filing separately and you lived apart from your spouse for all of 2025, check the box on line 6d.
 - ✓ Be sure you have read the Exception in the line 6a and 6b instructions to see if you can use this worksheet instead of a publication to find out if any of your benefits are taxable.

1. Enter the total amount from box 5 of ALL your Forms SSA-1099 and Forms RRB-1099. Also enter this amount on Form 1040 or 1040-SR, line 6a	1. <u>37,807</u>	
2. Multiply line 1 by 50% (0.50)		2. <u>18,904</u>
3. Combine the amounts from: Form 1040 or 1040-SR, lines 1z, 2b, 3b, 4b, 5b, 7a, and 8.		3. <u>721,836</u>
4. Enter the amount, if any, from Form 1040 or 1040-SR line 2a		4. <u>1,906</u>
5. Enter the total of any exclusions/adjustments for: • Adoption benefits (Form 8839, line 28) • Foreign earned income or housing (Form 2555, lines 45 and 50), and • Certain income of bona fide residents of American Samoa (Form 4563, line 15) or Puerto Rico		5. <u></u>
6. Combine lines 2, 3, 4 and 5		6. <u>742,646</u>
7. Enter the amounts from Schedule 1, lines 11 through 20, and 23 and 25		7. <u></u>
8. Is the amount on line 7 less than the amount on line 6?		
No. STOP None of your social security benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b.		
Yes. Subtract line 7 from line 6		8. <u>742,646</u>
9. If you are: • Married filing jointly, enter \$32,000 • Single, head of household, qualifying surviving spouse, or married filing separately and you lived apart from your spouse for all of 2025, enter \$25,000		9. <u>32,000</u>
Note: If you are married filing separately and you lived with your spouse at any time in 2025, skip lines 9 through 16; multiply line 8 by 85% (0.85) and enter the result on line 17. Then go to line 18.		
10. Is the amount on line 9 less than the amount on line 8?		
No. STOP 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 2025, check the box on line 6d.		
Yes. Subtract line 9 from line 8		10. <u>710,646</u>
11. Enter: \$12,000 if married filing jointly; \$9,000 if single, head of household, qualifying surviving spouse, or married filing separately and you lived apart from your spouse for all of 2025		11. <u>12,000</u>
12. Subtract line 11 from line 10. If zero or less, enter -0-		12. <u>698,646</u>
13. Enter the smaller of line 10 or line 11		13. <u>12,000</u>
14. Enter one-half of line 13		14. <u>6,000</u>
15. Enter the smaller of line 2 or line 14		15. <u>6,000</u>
16. Multiply line 12 by 85% (0.85). If line 12 is zero, enter -0-		16. <u>593,849</u>
17. Add lines 15 and 16		17. <u>599,849</u>
18. Multiply line 1 by 85% (0.85)		18. <u>32,136</u>
19. Taxable benefits. Enter the smaller of line 17 or line 18. Also enter this amount on Form 1040 or 1040-SR line 6b		19. <u>32,136</u>

TIP: If any of your benefits are taxable for 2025 and they include a lump-sum benefit payment that was for an earlier year, you may be able to reduce the taxable amount. See Lump-Sum Election in Pub. 915 for details.

2025 SCHEDULE D TAX WORKSHEET

& SCOTT F MITCHELL

Keep for Your Records

Complete this worksheet only if line 18 or line 19 of Schedule D is more than zero and lines 15 and 16 of Schedule D are gains or if you file Form 4952 and you have an amount on line 4g, even if you don't need to file Schedule D. Otherwise, complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040, line 16 (or in the instructions for Form 1040-NR, line 16) to figure your tax. Before completing this worksheet, complete Form 1040, 1040-SR, or 1040-NR through line 15.

Exception: Do not use the Qualified Dividends and Capital Gain Tax Worksheet or this worksheet to figure your tax if:

- Line 15 or line 16 of Schedule D is zero or less and you have no qualified dividends on Form 1040, 1040-SR, or 1040-NR line 3a; or
- Form 1040, 1040-SR, or 1040-NR, line 15 is zero or less.

Instead, see the instructions for Form 1040, line 16 (or Form 1040-NR, line 16).

1. Enter your taxable income from Form 1040 or 1040-SR, line 15 (or Form 1040-NR, line 15). (However, if you are filing Form 2555 (relating to foreign earned income), enter instead the amount from line 3 of the Foreign Earned Income Tax Worksheet in the instructions for Forms 1040, line 16)	1.	718,855
2. Enter your qualified dividends from Form 1040 or 1040-SR, line 3a (or Form 1040-NR, line 3a)	2.	21,234
3. Enter the amount from Form 4952 (used to figure investment interest expense deduction), line 4g	3.	
4. Enter the amount from Form 4952, line 4e*	4.	0
5. Subtract line 4 from line 3. If zero or less, enter -0-	5.	0
6. Subtract line 5 from line 2. If zero or less, enter -0-	6.	21,234
7. Enter the smaller of line 15 or line 16 of Schedule D	7.	422,554
8. Enter the smaller of line 3 or line 4	8.	
9. Subtract line 8 from line 7. If zero or less, enter -0-	9.	422,554
10. Add lines 6 and 9	10.	443,788
11. Add lines 18 and 19 of Schedule D**	11.	90
12. Enter the smaller of line 9 or line 11	12.	90
13. Subtract line 12 from line 10	13.	443,698
14. Subtract line 13 from line 1. If zero or less, enter -0-	14.	275,157
15. Enter: \$48,350 if single or married filing separately; \$96,700 if married filing jointly or qualifying widow(er); or \$64,750 if head of household	15.	96,700
16. Enter the smaller of line 1 or line 15	16.	96,700
17. Enter the smaller of line 14 or line 16	17.	96,700
18. Subtract line 10 from line 1. If zero or less, enter -0-	18.	275,067
19. Enter the smaller of line 1 or: \$197,300 if single or married filing separately; \$394,600 if married filing jointly or qualifying widow(er); or \$197,300 if head of household	19.	394,600
20. Enter the smaller of line 14 or line 19	20.	275,157
21. Enter the larger of line 18 or line 20	21.	275,157
22. Subtract line 17 from line 16. This amount is taxed at 0%	22.	0
If lines 1 and 16 are the same, skip lines 23 through 43 and go to line 44. Otherwise, go to line 23.		
23. Enter the smaller of line 1 or line 13	23.	443,698
24. Enter the amount from line 22 (if line 22 is blank, enter -0-)	24.	0
25. Subtract line 24 from line 23. If zero or less, enter -0-	25.	443,698
26. Enter: \$533,400 if single; \$300,000 if married filing separately; \$600,050 if married filing jointly or qualifying widow(er); or \$566,700 if head of household	26.	600,050
27. Enter the smaller of line 1 or line 26	27.	600,050
28. Add lines 21 and 22	28.	275,157
29. Subtract line 28 from line 27. If zero or less, enter -0-	29.	324,893
30. Enter the smaller of line 25 or line 29	30.	324,893

2025 SCHEDULE D TAX WORKSHEET - CONTINUED

& SCOTT F MITCHELL

Keep for Your Records

31. Multiply line 30 by 15% (.15)	31.	<u>48,734</u>
32. Add lines 24 and 30	32.	<u>324,893</u>
If lines 1 and 32 are the same, skip lines 33 through 43 and go to line 44. Otherwise, go to line 33.		
33. Subtract line 32 from line 23	33.	<u>118,805</u>
34. Multiply line 33 by 20% (.20)	34.	<u>23,761</u>
If Schedule D, line 19, is zero or blank, skip lines 35 through 40 and go to line 41. Otherwise, go to line 35.		
35. Enter the smaller of line 9 above or Schedule D, line 19	35.	<u>90</u>
36. Add lines 10 and 21	36.	<u>718,945</u>
37. Enter the amount from line 1 above	37.	<u>718,855</u>
38. Subtract line 37 from line 36. If zero or less, enter -0-	38.	<u>90</u>
39. Subtract line 38 from line 35. If zero or less, enter -0-	39.	<u>0</u>
40. Multiply line 39 by 25% (.25)	40.	<u>0</u>
If Schedule D, line 18, is zero or blank, skip lines 41 through 43 and go to line 44. Otherwise, go to line 41.		
41. Add lines 21, 22, 30, 33, and 39	41.	<u>0</u>
42. Subtract line 41 from line 1	42.	<u>0</u>
43. Multiply line 42 by 28% (.28)	43.	<u>0</u>
44. Figure the tax on the amount on line 21. If the amount on line 21 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 21 is \$100,000 or more, use the Tax Computation Worksheet	44.	<u>51,732</u>
45. Add lines 31, 34, 40, 43, and 44	45.	<u>124,227</u>
46. 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.	46.	<u>190,694</u>
47. Tax on all taxable income (including capital gains and qualified dividends). Enter the smaller of line 45 or or line 46. Also include this amount on form 1040 or 1040-SR, line 16 (or Form 1040NR, line 16). (If you are filing Form 2555, don't enter this amount on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet in the instructions for Forms 1040.)	47.	<u>124,227</u>

* If applicable, enter instead the smaller amount you entered on the dotted line next to line 4e of Form 4952.

**If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet in the instructions for Forms 1040, line 16, before completing this line.

2025 SCHEDULE D TAX WORKSHEETS

& SCOTT F MITCHELL

Keep for Your Records

28% RATE GAIN WORKSHEET -- LINE 18

1. Enter the total of all collectibles gain or (loss) from items you reported on Form 8949, Part II 1. _____
2. Enter as a positive number the amount of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code 'Q' in column (f), for which you excluded 50% of the gain, plus 2/3 of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code 'Q' in column (f), for which you excluded 60% of the gain, plus 1/3 of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code 'Q' in column (f), for which you excluded 75% of the gain. Do not make any entry for any section 1202 exclusion that is 100% of the gain. 2. _____
3. Enter the total of all collectibles gain or (loss) from Form 4684, line 4 (but only if Form 4684, line 15, is more than zero); Form 6252; Form 6781, Part II; and Form 8824 3. _____
4. Enter the total of any collectibles gain reported to you on:
 - Form 1099-DIV, box 2d;
 - Form 2439, box 1d; and
 - Schedule K-1 from a partnership, S corporation, estate, or trust.
 4. _____
5. Enter long-term capital loss carryovers from Sch D, line 14, and Sch K-1 (Form 1041), box 11, code D 5. _____
6. If Schedule D, line 7, is a (loss), enter that (loss) here. Otherwise, enter -0- 6. 0
7. Combine lines 1 through 6. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 18 7. _____

UNRECAPTURED SECTION 1250 GAIN WORKSHEET -- LINE 19

If you are not reporting a gain on Form 4797, line 7, skip lines 1 through 9 and go to line 10.

1. If you have a section 1250 property in Part III of Form 4797 for which you made an entry in Part I of Form 4797 (but not on Form 6252), enter the **smaller** of line 22 or line 24 of Form 4797 for that property. If you did not have any such property, go to line 4. If you had more than one such property, see instructions 1. _____
2. Enter the amount from Form 4797, line 26g, for the property for which you made an entry on line 1 2. _____
3. Subtract line 2 from line 1 3. _____
4. Enter the total unreaptured section 1250 gain included on line 26 or line 37 of Form(s) 6252 from installment sales of trade or business property held more than 1 year (see instructions) 4. _____
5. Enter the total of any amounts reported to you on a Schedule K-1 from a partnership or an S corporation as "unrecaptured section 1250 gain" 5. _____
6. Add lines 3 through 5 6. _____
7. Enter the **smaller** of line 6 or the gain from Form 4797, line 7 7. _____
8. Enter the amount, if any, from Form 4797, line 8 8. _____
9. Subtract line 8 from line 7. If zero or less, enter -0- 9. _____
10. Enter the amount of any gain from the sale or exchange of an interest in a partnership attributable to unreaptured section 1250 gain (see instructions) 10. _____
11. Enter the total of any amounts reported to you as "unrecaptured section 1250 gain" on a Schedule K-1, Form 1099-DIV, or form 2439 from an estate, trust, real estate investment trust, or mutual fund (or other regulated investment company) or in connection with a Form 1099-R 11. 90
12. Enter the total amount of any unreaptured section 1250 gain from sales (including installment sales) or other dispositions of section 1250 property held more than 1 year for which you did not make an entry in Part I of Form 4797 for the year of sale (see instructions) 12. _____
13. Add lines 9 through 12 13. 90
14. If you had any section 1202 gain or collectibles gain or (loss), enter the total of lines 1 through 4 of the **28% Rate Gain Worksheet**. Otherwise, enter -0- 14. 0
15. Enter the (loss), if any, from Schedule D, line 7. If Schedule D, line 7, is zero or a gain, enter -0- 15. 0
16. Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), box 11, code D* 16. _____
17. Combine lines 14 through 16. If the result is a (loss), enter it as a positive amount. If the result is zero or a gain, enter -0- 17. 0
18. **Unrecaptured section 1250 gain.** Subtract line 17 from line 13. If zero or less, enter -0-. If more than zero, enter the result here and on Schedule D, line 19 18. 90

* If you are filing Form 2555 (relating to foreign earned income), see the footnote in the Foreign Earned Income Tax Worksheet of the Form 1040 instructions before completing this line.

SCHEDULE D AMT
(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.

FOR AMT PURPOSES ONLY

2025
Attachment
Sequence No. **12**

Name(s) shown on return

& SCOTT F MITCHELL

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 or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see inst.). 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 or Box G checked	122,102	118,592		3,510
2 Totals for all transactions reported on Form(s) 8949 with Box B or Box H checked	216,487	208,353	5	8,139
3 Totals for all transactions reported on Form(s) 8949 with Box C or Box I checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824			4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions			6	()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2			7	11,649

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 or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see inst.). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.	39,994	41,657		-1,663
8b Totals for all transactions reported on Form(s) 8949 with Box D or Box J checked	795,402	397,117	-114	398,171
9 Totals for all transactions reported on Form(s) 8949 with Box E or Box K checked	135,983	110,141		25,842
10 Totals for all transactions reported on Form(s) 8949 with Box F or Box L 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	204
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions			14	()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2			15	422,554

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

Schedule D (Form 1040) 2025 Created 10/6/25

AMT ONLY

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	434,203
● If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7a. 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 7a. 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	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	90
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 7a, the smaller of: ● The loss on line 16; or ● (\$3,000), or if married filing separately, (\$1,500)	21	()
Note: When figuring which amount is smaller, treat both amounts as positive numbers.			
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

2025 SCHEDULE D AMT TAX WORKSHEETS

& SCOTT F MITCHELL

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AMT 28% RATE GAIN WORKSHEET -- LINE 18

1. Enter the total of all collectibles gain or (loss) from items you reported on Form 8949, Part II 1. _____
2. Enter as a positive number the amount of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code 'Q' in column (f), for which you excluded 50% of the gain, plus 2/3 of any section 1202 exclusion you reported in column (g) of Form 8949, Part II with code 'Q' in column (f), for which you excluded 60% of the gain, plus 1/3 of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code 'Q' in column (f), for which you excluded 75% of the gain. Do not make any entry for any section 1202 exclusion that is 100% of the gain 2. _____
3. Enter the total of all collectibles gain or (loss) from Form 4684, line 4 (but only if Form 4684, line 15, is more than zero); Form 6252; Form 6781, Part II; and Form 8824 3. _____
4. Enter the total of any collectibles gain reported to you on:
 - Form 1099-DIV, box 2d;
 - Form 2439, box 1d; and
 - Schedule K-1 from a partnership, S corporation, estate, or trust.
 4. _____
5. Enter long-term capital loss carryovers from Sch D, line 14, and Schedule K-1 (Form 1041), box 11, code C 5. _____
6. If Schedule D, line 7, is a (loss), enter that (loss) here. Otherwise, enter -0- 6. 0
7. Combine lines 1 through 6. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 18 7. _____

AMT UNRECAPTURED SECTION 1250 GAIN WORKSHEET -- LINE 19

If you are not reporting a gain on Form 4797, line 7, skip lines 1 through 9 and go to line 10.

1. If you have a section 1250 property in Part III of Form 4797 for which you made an entry in Part I of Form 4797 (but not on Form 6252), enter the **smaller** of line 22 or line 24 of Form 4797 for that property. If you didn't have any such property, go to line 4. If you had more than one such property, see instructions 1. _____
2. Enter the amount from Form 4797, line 26g, for the property for which you made an entry on line 1 2. _____
3. Subtract line 2 from line 1 3. _____
4. Enter the total unrecaptured section 1250 gain included on line 26 or line 37 of Form(s) 6252 from installment sales of trade or business property held more than 1 year (see instructions) 4. _____
5. Enter the total of any amounts reported to you on a Schedule K-1 from a partnership or an S corporation as "unrecaptured section 1250 gain" 5. _____
6. Add lines 3 through 5 6. _____
7. Enter the **smaller** of line 6 or the gain from Form 4797, line 7 7. _____
8. Enter the amount, if any, from Form 4797, line 8 8. _____
9. Subtract line 8 from line 7. If zero or less, enter -0- 9. 0
10. Enter the amount of any gain from the sale or exchange of an interest in a partnership attributable to unrecaptured section 1250 gain (see instructions) 10. _____
11. Enter the total of any amounts reported to you on a Schedule K-1, Form 1099-DIV, and Form 2439 as "unrecaptured section 1250 gain" from an estate, trust, real estate investment trust, or mutual fund (or other regulated investment company) 11. 90
12. Enter the total amount of any unrecaptured section 1250 gain from sales (including installment sales) or other dispositions of section 1250 property held more than 1 year for which you didn't make an entry in Part I of Form 4797 for the year of sale (see instructions) 12. _____
13. Add lines 9 through 12 13. 90
14. If you had any section 1202 gain or collectibles gain or (loss), enter the total of lines 1 through 4 of the **28% Rate Gain Worksheet**. Otherwise, enter -0- 14. 0
15. Enter the (loss), if any, from Schedule D, line 7. If Schedule D, line 7, is zero or a gain, enter -0- 15. 0
16. Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), box 11, code D* 16. _____
17. Combine lines 14 through 16. If the result is a (loss), enter it as a positive amount. If the result is zero or a gain, enter -0- 17. 0
18. **Unrecaptured section 1250 gain.** Subtract line 17 from line 13. If zero or less, enter -0-. If more than zero, enter the result here and on Schedule D, line 19 18. 90

* If you are filing Form 2555 or 2555-EZ (relating to foreign earned income), see the footnote in the Foreign Earned Income Tax Worksheet of the Form 1040 instructions before completing this line.

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

SCOTT F MITCHELL

SSN or taxpayer identification number

Before you check Box A, B, C, G, H, or I below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, C, G, H, or I 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 **was not** reported to the IRS
- ☐ (C) Short-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (G) Short-term transactions reported on Form(s) 1099-DA showing basis **was** reported to the IRS (see **Note** above)
- ☐ (H) Short-term transactions reported on Form(s) 1099-DA showing basis **was not** reported to the IRS
- ☐ (I) Short-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB		12-31-25	153	154	M		-1
	SCHWAB		12-31-25	121,949	118,438	M		3,511
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if Box A or Box G above is checked), line 2 (if Box B or Box H above is checked), or line 3 (if Box C or Box I above is checked) -				122,102	118,592		0	3,510

Note: If you checked Box A or Box G 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.

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

Form **8949** (2025) Created 5/5/25

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

SSN or taxpayer identification number

SCOTT F MITCHELL

Before you check Box D, E, F, J, K, or L below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, F, J, K, or L 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 **was not** reported to the IRS
- ☐ (F) Long-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (J) Long-term transactions reported on Form(s) 1099-DA showing basis **was** reported to the IRS (see **Note** above)
- ☐ (K) Long-term transactions reported on Form(s) 1099-DA showing basis **was not** reported to the IRS
- ☐ (L) Long-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB	08-23-93	12-18-25	31,751	421			31,330
	SCHWAB	VARIOUS	12-05-25	104,195	109,695			-5,500
	CANANDAIGUA N	11-13-09	08-05-25	37	25			12
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 8b (if Box D or Box J above is checked), line 9 (if Box E or Box K above is checked), or line 10 (if Box F or Box L above is checked).				135,983	110,141			25,842

Note: If you checked Box D or Box J 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.

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

SSN or taxpayer identification number

SCOTT F MITCHELL

Before you check Box A, B, C, G, H, or I below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, C, G, H, or I 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 **was not** reported to the IRS
- ☐ (C) Short-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (G) Short-term transactions reported on Form(s) 1099-DA showing basis **was** reported to the IRS (see **Note** above)
- ☐ (H) Short-term transactions reported on Form(s) 1099-DA showing basis **was not** reported to the IRS
- ☐ (I) Short-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB		12-31-25	216,487	208,353	M	5	8,139
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if Box A or Box G above is checked), line 2 (if Box B or Box H above is checked), or line 3 (if Box C or Box I above is checked) -				216,487	208,353	5	8,139

Note: If you checked Box A or Box G 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.

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

Form **8949** (2025) Created 5/5/25

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

SSN or taxpayer identification number

& SCOTT F MITCHELL

Before you check Box D, E, F, J, K, or L below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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.

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For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B and Form(s) 1099-DA 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, F, J, K, or L 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 **was not** reported to the IRS
- ☐ (F) Long-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (J) Long-term transactions reported on Form(s) 1099-DA showing basis **was** reported to the IRS (see **Note** above)
- ☐ (K) Long-term transactions reported on Form(s) 1099-DA showing basis **was not** reported to the IRS
- ☐ (L) Long-term digital asset transactions not reported to you on Form 1099-DA or 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	
	SCHWAB			636,409	226,387	MW	-114	409,908
	CANANDAIGUA		12-31-25	158,993	170,730	M		-11,737
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 8b (if Box D or Box J above is checked), line 9 (if Box E or Box K above is checked), or line 10 (if Box F or Box L above is checked).				795,402	397,117		-114	398,171

Note: If you checked Box D or Box J 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.

2025 FORM 8960 MAGI WORKSHEET

& SCOTT F MITCHELL

Keep for Your Records

1. Enter your adjusted gross income 1. 753,972
2. Foreign earned income exclusion:
 - (a) Enter your foreign earned income exclusion (from line 42 of Form 2555) 2(a). _____
 - (b) Enter the deductions reported on line 44 of Form 2555 allocable to your foreign earned income exclusion (b). (_____)
 - (c) Combine lines 2(a) and 2(b) 2. _____
3. Adjustments for certain CFCs and certain PFICs 3. _____
4. Enter the sum of line 1, line 2(c), and line 3. (Enter this amount on Form 8960, line 13) 4. 753,972

2025 INVESTMENT INCOME WORKSHEET FOR EIC

& SCOTT F MITCHELL

Keep for Your Records

Publication 596

Use this worksheet to figure investment income for the EIC when you file Form 1040 or 1040-SR.

Interest and Dividends

1. Enter any amount from Form 1040 or 1040-SR, line 2b 1. 3,158
2. Enter any amount from Form 1040 or 1040-SR, line 2a, plus any amount on Form 8814, line 1b 2. 1,906
3. Enter any amount from Form 1040 or 1040-SR, line 3b 3. 31,386
4. Enter the amount from Schedule 1 (Form 1040), line 8z, that is from Form 8814 if you are filing that form to report your child's interest and dividend income on your return. (If your child received an Alaska Permanent Fund dividend, use Worksheet 2 in this chapter to figure the amount to enter on this line.) ... 4. _____

Capital Gain Net Income

5. Enter the amount from Form 1040 or 1040-SR, line 7. If the amount on that line is a loss, enter -0- 5. 434,203
6. Enter any gain from Form 4797, Sales of Business Property, line 7. If the amount on that line is a loss, enter -0-. (But, if you completed lines 8 and 9 of Form 4797, enter the amount from line 9 instead.) 6. 0
7. Subtract line 6 of this worksheet from line 5 of this worksheet. (If the result is less than zero, enter -0-.) 7. 434,203

Royalties and Rental Income From Personal Property

8. Enter any royalty income from Schedule E, line 23b, plus any income from the rental of personal property shown on Schedule 1 (Form 1040), line 8l 8. _____
9. Enter any expenses from Schedule E, line 20, related to royalty income, plus any expenses from the rental of personal property deducted on Schedule 1 (Form 1040), line 24b 9. _____
10. Subtract the amount on line 9 of this worksheet from the amount on line 8. (If the result is less than zero, enter -0-.) 10. 0

Passive Activities

11. Enter the total of any net income from passive activities (such as income included on Schedule E, line 26, 29a (col. (h)), 34a (col. (d)), or 40; or an ordinary gain identified as "FPA" on Form 4797, line 10). (See instructions below for lines 11 and 12.) 11. _____
12. Enter the total of any losses from passive activities (such as losses included on Schedule E, line 26, 29b (col. (g)), 34b (col. (c)), or 40; or an ordinary loss identified as "PAL" on Form 4797, line 10). (See instructions below for lines 11 and 12.) 12. 0
13. Combine the amounts on lines 11 and 12 of this worksheet. (If the result is less than zero, enter -0-.) 13. _____
14. Add the amounts on lines 1, 2, 3, 4, 7, 10, and 13. Enter the total. **This is your investment income** 14. 470,653
15. Is the amount on line 14 more than \$11,950?
☒ **Yes.** You can't take the credit.
☐ **No.** Go to Step 3 of the Form 1040 instructions for line 27 to find out if you can take the credit (unless you are using this publication to find out if you can take the credit; in that case, go to Rule 7 next).

Instructions for lines 11 and 12. In figuring the amount to enter on lines 11 and 12, don't take into account any royalty income (or loss) included on line 26 of Schedule E or any income (or loss) included in your earned income or on line 1, 2, 3, 4, 7, or 10 of this worksheet. To find out if the income on line 26 of Schedule E is from a passive activity, see the Schedule E instructions. If any of the rental real estate income (or loss) included on Schedule E, line 26, isn't from a passive activity, enter "NPA" and the amount of that income (or loss) on the dotted line next to line 26.

2026 FEDERAL ESTIMATED TAX WORKSHEET

& SCOTT F MITCHELL

Keep for Your Records

	2025 (a)	Adjustment (b)	2026 ES Tax (c)
Filing Status	MFJ		MFJ
1. Ordinary income (wages, interest, taxable refunds, rental, etc)	298,535		298,535
2. Qualified dividends and/or long term capital gain (0%, 15% or 20%)	443,788		443,788
3a. Self-employment income (taxpayer)			
b. Self-employment income (spouse)			
4. Adjustments			
5. Adjusted Gross Income (lines 1-3 less line 4)	742,323		742,323
6. Itemized deductions			
7. Standard deduction	34,700		35,500
8a. Qualified business income deduction	417		417
b. Additional deductions from Sch1-A			
9. Taxable income (line 5 less (the greater of line 6 or line 7) less line 8)	707,206		706,406
10. Tax	124,227		120,110
11. Alternative minimum tax			
12. Nonrefundable credits	120		120
13. Summary (lines 10 and 11 less line 12)	124,107		119,990
14a. Self-employment tax (worksheet not supported by BW)			
b. Other taxes (2025 Form 1040 Schedule 2, line 7)			
15. Refundable credits (2025 Form 1040, lines 27, 28, 29 and 30 and Schedule 3, lines 9 and 12)			
16. Gross 2025 estimated tax (line 13 plus line 14 less line 15)	124,107		119,990
17. Required payment to avoid penalty *	136,518		107,991
18. Selected estimated tax (see assumptions below)			136,518
19. Total withholding amount (including Additional Medicare Tax)			39,891
20. Total 2026 estimated tax payments paid to date			
21. Balance due (line 18 less lines 19 and 20)			96,627

VOUCHER AMOUNTS

Due Date	Estimated Tax	Overpayment Applied	Tentative Amount	Voucher Amount	Date Paid	Amount Paid
04/15/2026	10,000		10,000	10,000		
06/15/2026	10,000		10,000	10,000		
09/15/2026	10,000		10,000	10,000		
01/15/2027	10,000		10,000	10,000		
TOTALS:	40,000		40,000	40,000		

Assumptions:

Estimate Option - 100% of this years tax (110% if AGI is over \$150,000)
 Overpayment Option - Refund all overpayment
 Overpayment Allocation - Consecutive
 Threshold Option - Prepare vouchers if line 21 is greater than zero
 Rounding Option - No rounding
 Prepare all vouchers

* The required payment to avoid penalty is the lesser of 100% of 2025 tax (line 16, column a) or 90% of 2026 ES tax (line 16, column c). If 2025 AGI is greater than \$150,000 (\$75,000, MFS), then the required payment is 110% of 2025 tax or 90% of 2026 ES tax. For farmers and fisherman (2026 ES option 5), the required annual payment is the lesser of 100% of 2025 tax or 66.67% of 2026 ES tax. These calculations are automatically based on the 2026 ES Tax option selected. Refer to Pub 505 for more information.

A voucher is printed at the bottom of this page.

NOTE: This is a new scannable voucher approved by the IRS for filing of the 1040-ES for the year 2026.
This is different than the voucher that is on the IRS website.

- ▶ Do not send cash.
- ▶ Make your check or money order payable to the "United States Treasury".
- ▶ Write your Social Security Number (SSN) and 2026 Form 1040ES on your check or money order.
- ▶ Enclose, but do not staple or attach, your payment with this voucher.
- ▶ Mail payment before April 15, 2026.
- ▶ **Alert:** USPS postmark dates are based on when your return or payment is processed at a USPS facility—not when you drop it in the mail. Mailing on the due date may result in a late filing.

Mail payment to:
Internal Revenue Service
P O Box 1300
Charlotte, NC 28201-1300

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25 1040ESS1 BWO 1040

▼ Detach Here and Mail with Your Payment ▼

Form **1040-ES** (2026)

Form 1040-ES Department of the Treasury Internal Revenue Service	2026 OMB No. 1545-0074	Estimated Tax	Payment Voucher 1	Calendar year - Due April 15, 2026
Amount of estimated tax you are paying by check or money order.			Dollars 10,000	

- ▶ Make your check or money order payable to "United States Treasury."
- ▶ Enter your SSN and "2026 Form 1040-ES" on your payment.
- ▶ If your name, address, or SSN is incorrect, see instructions.

1735

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

& SCOTT F MITCHELL

INTERNAL REVENUE SERVICE
P O Box 1300
Charlotte, NC 28201-1300

A voucher is printed at the bottom of this page.

NOTE: This is a new scannable voucher approved by the IRS for filing of the 1040-ES for the year 2026.
This is different than the voucher that is on the IRS website.

- ▶ Do not send cash.
- ▶ Make your check or money order payable to the "United States Treasury".
- ▶ Write your Social Security Number (SSN) and 2026 Form 1040ES on your check or money order.
- ▶ Enclose, but do not staple or attach, your payment with this voucher.
- ▶ Mail payment before June 15, 2026.
- ▶ **Alert:** USPS postmark dates are based on when your return or payment is processed at a USPS facility—not when you drop it in the mail. Mailing on the due date may result in a late filing.

Mail payment to:
Internal Revenue Service
P O Box 1300
Charlotte, NC 28201-1300

Form Software Copyright 1996 - 2026 HRB Tax Group, Inc.

25 1040ESS2 BWO 1040

▼ Detach Here and Mail with Your Payment ▼

Form **1040-ES** (2026)

Form 1040-ES

Department of the Treasury
Internal Revenue Service

2026

OMB No. 1545-0074

Estimated Tax

**Payment
Voucher 2**

Calendar year -
Due June 15, 2026

- ▶ Make your check or money order payable to "United States Treasury."
- ▶ Enter your SSN and "2026 Form 1040-ES" on your payment.
- ▶ If your name, address, or SSN is incorrect, see instructions.

**Amount of estimated tax you are
paying by check or money order.**

Dollars
10,000

1735

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

& SCOTT F MITCHELL

INTERNAL REVENUE SERVICE
P O Box 1300
Charlotte, NC 28201-1300

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NOTE: This is a new scannable voucher approved by the IRS for filing of the 1040-ES for the year 2026.
This is different than the voucher that is on the IRS website.

- ▶ Do not send cash.
- ▶ Make your check or money order payable to the "United States Treasury".
- ▶ Write your Social Security Number (SSN) and 2026 Form 1040ES on your check or money order.
- ▶ Enclose, but do not staple or attach, your payment with this voucher.
- ▶ Mail payment before September 15, 2026.
- ▶ **Alert:** USPS postmark dates are based on when your return or payment is processed at a USPS facility—not when you drop it in the mail. Mailing on the due date may result in a late filing.

Mail payment to:
Internal Revenue Service
P O Box 1300
Charlotte, NC 28201-1300

Form Software Copyright 1996 – 2026 HRB Tax Group, Inc.

25 1040ESS3 BWO 1040

▼ Detach Here and Mail with Your Payment ▼

Form **1040-ES** (2026)

Form 1040-ES Department of the Treasury Internal Revenue Service	2026 OMB No. 1545-0074	Estimated Tax	Payment Voucher 3	Calendar year - Due Sept. 15, 2026
Amount of estimated tax you are paying by check or money order.			Dollars 10,000	

- ▶ Make your check or money order payable to "United States Treasury."
- ▶ Enter your SSN and "2026 Form 1040-ES" on your payment.
- ▶ If your name, address, or SSN is incorrect, see instructions.

1735

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

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Charlotte, NC 28201-1300

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NOTE: This is a new scannable voucher approved by the IRS for filing of the 1040-ES for the year 2026.
This is different than the voucher that is on the IRS website.

- ▶ Do not send cash.
- ▶ Make your check or money order payable to the "United States Treasury".
- ▶ Write your Social Security Number (SSN) and 2026 Form 1040ES on your check or money order.
- ▶ Enclose, but do not staple or attach, your payment with this voucher.
- ▶ Mail payment before January 15, 2027.
- ▶ **Alert:** USPS postmark dates are based on when your return or payment is processed at a USPS facility—not when you drop it in the mail. Mailing on the due date may result in a late filing.

Mail payment to:
Internal Revenue Service
P O Box 1300
Charlotte, NC 28201-1300

Form Software Copyright 1996 – 2026 HRB Tax Group, Inc.
25 1040ESS4 BWO 1040

▼ Detach Here and Mail with Your Payment ▼

Form **1040-ES** (2026)

Form 1040-ES Department of the Treasury Internal Revenue Service	2026 OMB No. 1545-0074	Estimated Tax	Payment Voucher 4	Calendar year - Due January 15, 2027
Amount of estimated tax you are paying by check or money order.			Dollars 10,000	

- ▶ Make your check or money order payable to "United States Treasury."
- ▶ Enter your SSN and "2026 Form 1040-ES" on your payment.
- ▶ If your name, address, or SSN is incorrect, see instructions.

1735

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

& SCOTT F MITCHELL

INTERNAL REVENUE SERVICE
P O Box 1300
Charlotte, NC 28201-1300

2026 ESTIMATED PAYMENT OF FORM 1040 INDIVIDUAL INCOME TAX

Department of the Treasury
Internal Revenue Service

TAXPAYER'S COPY

Taxpayer's Social Security Number [REDACTED]		Spouse's Social Security Number [REDACTED]		For Calendar Year 2026 or Fiscal Year Ending	
First Name(s) and Initial(s) [REDACTED]		Last Name(s) & SCOTT F MITCHELL		Estimated Tax for the Year	136,518
Address [REDACTED]				Overpayment Credited to this Year	
City, State, Zip [REDACTED]				Total Amount to be Paid	96,627
Make Check or Money Order Payable to: United States Treasury				Installment Due April 15, 2026	10,000
Include SS#(s) on Payment.				June 15, 2026	10,000
Payment Record	April 15, 2026	June 15, 2026	Sept. 15, 2026	Jan. 15, 2027	Sept. 15, 2026
Amount Paid					10,000
Date					Jan. 15, 2027
Check Number					10,000

2026 ESTIMATED PAYMENT OF
FORM 1040 INDIVIDUAL INCOME TAX

Department of the Treasury
Internal Revenue Service

PRACTITIONER'S COPY

Taxpayer's Social Security Number [REDACTED]		Spouse's Social Security Number [REDACTED]		For Calendar Year 2026 or Fiscal Year Ending	
First Name(s) and Initial(s) [REDACTED] & SCOTT F MITCHELL		Last Name(s) [REDACTED]		Estimated Tax for the Year	136,518
Address [REDACTED]				Overpayment Credited to this Year	
City, State, Zip [REDACTED]				Total Amount to be Paid	96,627
Make Check or Money Order Payable To: United States Treasury					
				Installment Due April 15, 2026	10,000
				June 15, 2026	10,000
				Sept. 15, 2026	10,000
				Jan. 15, 2027	10,000

2025 QUALIFIED BUSINESS INCOME DEDUCTION WORKSHEET DETAIL BY BUSINESS

& SCOTT F MITCHELL

Schedule/Form	DIV # 1	DIV # 4	DIV # 6
Business Name	CHARLES	Canandai	Canandai
EIN/SSN	94-1737782	16-1495122	16-1495122
Business Type	Non-Spec	Non-Spec	Non-Spec
Included in Aggregation #			
PTP Income	No	No	No
Qualified Business Income (QBI)			
1. Specified Business Income/Loss from Sch/Form			
2. Non-Specified Business Income/Loss from Sch/Form			
Less applicable adjustments from 1040 Schedule 1 & 1A			
(includes SE Tax, SEHIN, Qual Retirement plans & qualified			
Tips deductions)			
3. QBIID Qualified Losses and ST Gains from Asset Disposition			
4. Net Qualified Business Income (QBI) (sum L1 - L3)			
Qualified Other Income (QOI)			
5. Qualified REIT Sec 199A Dividends from 1099-DIV and K-1s	2025	55	3
6. Qualified Other Income from PTPs			
7. QOI Qualified Losses and ST Gains from Disposition incl Sale of PTP			
8. Net Qualified Other Income (QOI) (L5 + L6 + L7)	2025	55	3
9. Net QBI and QOI (L4 + L8)	2025	55	3

2026 CARRYFORWARD INFORMATION

& SCOTT F MITCHELL

Keep for Your Records

Itemized Returns Only – 2025 state and local tax refund (this amount will be proforma'd to

Taxable Refund Worksheet directly and may not be taxable in 2026)

Charitable contributions carryover to 2026	
Estimated short-term capital loss carryover	
Estimated long-term capital loss carryover	
2025 tax liability (for 2026 Form 2210 purposes)	141,919
Form 8839: 2025 carryover of unqualified expenses	
Refund amount applied to 2026	
Disallowed investment interest in 2025	
Additional state taxes paid	
Form 8396: Mortgage interest credit from 2023	
Mortgage interest credit from 2024	
Mortgage interest credit from 2025	
Form 8801: Minimum tax credit carryforward	0
Foreign Tax Credit carryforward to 2026	
General Business Credit carryforward to 2026	
Potential 2026 IRA contribution from 2025 tax refund	
NOL carryforward:	

Regular Tax				AMT Tax			
from 2005		from 2015		from 2005		from 2015	
from 2006		from 2016		from 2006		from 2016	
from 2007		from 2017		from 2007		from 2017	
from 2008		from 2018		from 2008		from 2018	
from 2009		from 2019		from 2009		from 2019	
from 2010		from 2020		from 2010		from 2020	
from 2011		from 2021		from 2011		from 2021	
from 2012		from 2022		from 2012		from 2022	
from 2013		from 2023		from 2013		from 2023	
from 2014		from 2024		from 2014		from 2024	
Gross NOL generated in 2025				Gross AMT NOL generated in 2025			
To be absorbed in carryback period				To be absorbed in carryback period			
Net carryforward from 2025				Net carryforward from 2025			
Total carryforward to 2026				Total carryforward to 2026			

- Amounts from Schedule E (Pages 1 and/or 2) that are eligible for carryforward to the next tax year are reported on Form 8582. Any associated Alternative Minimum Tax (AMT) carryforward amounts are reflected on the AMT version of Form 8582.
- If there are Form(s) 6252 in this tax return, the gross profit ratio and prior payments received (including the current year payments) will carry forward from each Form 6252.
- Gross NOL generated in CY and Total carryforward to NY includes the excess business loss from Form 461, line 16.

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Charlotte, NC 28201-1300

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2025 SCHEDULE B - INTEREST/DIVIDEND SUMMARY ATTACHMENT

[REDACTED] MITCHELL
[REDACTED]

TAX-EXEMPT INTEREST/DIVIDENDS

EXEMPT-INTEREST DIVIDENDS (FORM1099-DIV)	293
TOTAL TAX-EXEMPT INTEREST	1,906
TOTAL TAX-EXEMPT INTEREST TO 1040 LINE 2A	1,906

2025 CAPITAL GAIN DISTRIBUTION SUMMARY ATTACHMENT

[REDACTED] MITCHELL
[REDACTED]

CHARLES SCHWAB COINC	190
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Canandaigua National Bank and Trust	14
TOTAL CAP GAIN DISTRIBUTION (TO 1040/1040-SR LINE 7)	204

2025 FORM 2210 UNDERPAYMENT PENALTY WORKSHEET

[REDACTED] SCOTT F MITCHELL [REDACTED]

		PAYMENT ALLOCATION				
Due Date		4/15/2025	6/16/2025	9/15/2025	1/15/2026	Total
Required Installment		16,936	16,936	16,936	16,936	67,744

ESTIMATED PAYMENT	03/31/2025	2,250				2,250
WITHHOLDING	04/15/2025	9,973				9,973
ESTIMATED PAYMENT	06/13/2025	2,250				2,250
WITHHOLDING	06/16/2025	2,463				2,463

BALANCE DUE	03/12/2026		16,936	16,936	16,936	50,808
TOTAL PAYMENTS	03/12/2026	16,936	16,936	16,936	16,936	67,744

PENALTY CALCULATION							
Transaction	Date	Beginning Balance	Amount	Adjusted Balance	Days Late	Interest Rate	Penalty
FIRST INSTALLMENT 4/15/2025							
REQUIRED INSTALLMENT	03/31 /2025		16,936	16,936			
ESTIMATED PAYMENT	03/31 /2025	16,936	2,250	14,686			
WITHHOLDING	04/15 /2025	14,686	9,973	4,713			
ESTIMATED PAYMENT	06/13 /2025	4,713	2,250	2,463	59	7	25
WITHHOLDING	06/16 /2025	2,463	2,463		62	7	29

TOTAL 1ST QTR PENALTY	54
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SECOND INSTALLMENT 6/16/2025							
REQUIRED INSTALLMENT	06/16 /2025		16,936	16,936			
RATE PERIOD CHANGE	04/01 /2025	16,936	16,936		14	7	45
RATE PERIOD CHANGE	07/01 /2025	16,936	16,936		92	7	299
RATE PERIOD CHANGE	10/01 /2025	16,936	16,936		92	7	299
BALANCE DUE	03/12 /2026	16,936	16,936		71	7	231

TOTAL 2ND QTR PENALTY	874
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THIRD INSTALLMENT 9/15/2025

REQUIRED INSTALLMENT	09/15 /2025		16,936	16,936			
RATE PERIOD CHANGE	07/01 /2025	16,936	16,936		15	7	49
RATE PERIOD CHANGE	10/01 /2025	16,936	16,936		92	7	299
BALANCE DUE	03/12 /2026	16,936	16,936		71	7	231

TOTAL 3RD QTR PENALTY	579
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FOURTH INSTALLMENT 1/15/2026

REQUIRED INSTALLMENT	01/15 /2026		16,936	16,936			
BALANCE DUE	03/12 /2026	16,936	16,936		56	7	182

TOTAL 4TH QTR PENALTY

182

TOTAL PENALTY

1,689

 & SCOTT F MITCHELL

Taxpayer's Signature Signature and Date on File

Date _____

Taxpayer's Printed Name  MITCHELL

Spouse's Signature (if MFJ) Signature and Date on File

Date _____

Spouse's Printed Name (if MFJ) SCOTT F MITCHELL