

General Information

Name: Hon Daliah H Weiss

CONFIDENTIAL

Address: 205 N Dixie Hwy # 11.2204, West Palm Bch, FL 33401

PID 17874

County: Palm Beach

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (15Th)	Elected Constitutional Officer	Circuit Court Judge

Net WorthMy Net Worth as of December 31, 2022 was \$ 952,804.99.**Assets**

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

The aggregate value of my household goods and personal effect is \$ 45,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}	\$ 518,626.00
2021 Starcraft MDX 211	\$ 38,900.00
Wells Fargo Checking Account	\$ 42,994.00

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/16/2023

Description of Asset	Value of Asset
Wells Fargo Checking Account - joint	\$ 17,900.00
Bank of America checking account	\$ 5,688.00
Chase savings account	\$ 2,636.00
Life Insurance Universal Life (tenants in common)	\$ 59,067.79
State of Israel bonds for Child #1	\$ 1,800.00
State of Israel bonds for Child #2	\$ 1,800.00
Morgan Stanley brokerage account owned jointly with Child #1: case \$403.70, Disney stock \$8861.76, Vanguard Dividends stock: \$4555.50	\$ 13,910.21
Morgan Stanley brokerage account-in my name: cash	\$ 2,144.01
Fidelity Funds 529 Child #1	\$ 35,846.09
Fidelity Funds 529 Child #1	\$ 3,511.00
Fidelity Funds 529 Child #2	\$ 2,966.71
Trust of Child #1 Fidelity Freedom 529	\$ 29,680.00
Trust of Child #2 Fidelity Freedom 529	\$ 35,920.77
Learning Quest 529-Schwab: American Century Growth Fund	\$ 2,870.79
Schwab con't: American Century Disciplined Core Value Fund	\$ 3,588.48
Schwab con't: American Century Value Fund	\$ 2,870.79
Schwab con't: American Century Real Estate Fund	\$ 1,076.49
Schwab con't: Vanguard Total International Stock Index Fund	\$ 1,435.39
Schwab con't: American Century Focused Global Growth Fund	\$ 1,076.49
Schwab con't: Baird Core Plus Fund	\$ 8,432.93
Schwab con't: Vanguard Total Bond Market Index Fund	\$ 8,612.35
Schwab con't: Ultra Short Bond Account	\$ 14,353.93
Schwab con't: American Century Short Duration Inflation Protection Bond Fund	\$ 5,023.87
Schwab con't: American Century International Bond Fund	\$ 3,050.21
VOYA Financial: Voya Fixed Account	\$ 1,325.41

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/16/2023

Description of Asset	Value of Asset
VOYA con't: Voya Intermediate Bond	\$ 1,176.79
VOYA con't: American Funds Am Balanced	\$ 1,255.58
VOYA con't: Vanguard FTSE Social Index	\$ 1,165.70
Morgan Stanley brokerage account in my name: Alcon	\$ 1,850.85
MS continued: Chermours	\$ 1,316.66
MS continued: Colgate/Palmolive	\$ 7,879.00
MS continued: Corteva Inc.	\$ 5,407.76
MS continued: Dominion Energy	\$ 21,094.08
MS continued: Dow Inc.	\$ 4,635.88
MS continued: DuPont	\$ 6,313.96
MS continued: Eli Lilly	\$ 48,656.72
MS continued: Johnson and Johnson	\$ 28,970.60
MS continued: NextEra	\$ 104,500.00
MS continued: Novartis	\$ 12,247.20
MS continued: PepsiCo	\$ 36,493.32
MS continued: Verizon	\$ 5,319.00
MS continued: WalMart de Mexico	\$ 9,472.73
MS continued: Ishares Russell	\$ 13,077.00
MS continued: Vanguard RealEst	\$ 9,248.00
MS continued: BNY Mellon	\$ 12,869.59
MS continued: Fidelity Intl Discovery Fund	\$ 6,039.45
MS continued: Harbor Bond Fund	\$ 15,988.30
MS continued: T Rowe Price	\$ 35,981.37
Voya continued: American Funds Growth Fund	\$ 2,160.14
Voya continued: Loomis Sayles Sm Cap Growth	\$ 1,154.07
Voya continued: JP Morgan Mid Cap Growth	\$ 2,208.87
Voya continued: American Funds New Perspective	\$ 1,136.22

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Home mortgage: Morgan Stanley Home Loans	PO Box 94807. Palatine, IL 60094	\$ 274,709.00
SUV lease: Mercedes Benz Financial Services	PO Box 76262, Roanoke, TX 76262	\$ 39,755.00
vessel lease: US Bank, SE RV/Marine	PO Box 790179, St. Louis, MO 63179-0179	\$ 36,083.00

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.

☒ I elect to file a copy of my 2022 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):

Business Entity	Major Sources of Business Income	Address	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.

Daliah H Weiss

Digitally signed: 06/15/2023

Filed with COE: 06/16/2023

Filing Status ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Your first name and middle initial [REDACTED] Weiss		Last name [REDACTED]	Your social security number [REDACTED]
If joint return, spouse's first name and middle initial Daliah Handel Weiss		Last name [REDACTED]	Spouse's social security number [REDACTED]
Home address (number and street). If you have a P.O. box, see instructions. [REDACTED]			Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code [REDACTED]			
Foreign country name Foreign province/state/county Foreign postal code [REDACTED]			

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

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

Age/Blindness **You:** ☐ Were born before January 2, 1958 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1958 ☐ Is blind

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

Income	1 a Total amount from Form(s) W-2, box 1 (see instructions)	1a	351,929.
	b Household employee wages not reported on Form(s) W-2	1b	
	c Tip income not reported on line 1a (see instructions)	1c	
	d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
	e Taxable dependent care benefits from Form 2441, line 26	1e	
	f Employer-provided adoption benefits from Form 8839, line 29	1f	
	g Wages from Form 8919, line 6	1g	
	h Other earned income (see instructions)	1h	
	i Nontaxable combat pay election (see instructions) 1i		
	z Add lines 1a through 1h	1z	351,929.
Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.	2 a Tax-exempt interest 2a	b Taxable interest 2b	74.
	3 a Qualified dividends 3a	b Ordinary dividends 3b	9,144.
	4 a IRA distributions 4a	b Taxable amount 4b	
	5 a Pensions and annuities 5a	b Taxable amount 5b	
	6 a Social security benefits 6a	b Taxable amount 6b	
	c If you elect to use the lump-sum election method, check here (see instructions) ☐		
	7 Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐	7	8,894.
	8 Other income from Schedule 1, line 10 8		311.
	9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income 9		370,352.
	10 Adjustments to income from Schedule 1, line 26 10		
11 Subtract line 10 from line 9. This is your adjusted gross income 11		370,352.	
Standard Deduction for — • Single or Married filing separately, \$12,950 • Married filing jointly or Qualifying surviving spouse, \$25,900 • Head of household, \$19,400 • If you checked any box under Standard Deduction , see instructions.	12 Standard deduction or itemized deductions (from Schedule A) 12		25,900.
	13 Qualified business income deduction from Form 8995 or Form 8995-A 13		47.
	14 Add lines 12 and 13 14		25,947.
	15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income 15		344,405.

Tax and Credits

16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814	16	69,817.
2	☐ 4972	3	☒ Statement 1
17	Amount from Schedule 2, line 3.	17	
18	Add lines 16 and 17.	18	69,817.
19	Child tax credit or credit for other dependents from Schedule 8812.	19	1,000.
20	Amount from Schedule 3, line 8.	20	420.
21	Add lines 19 and 20.	21	1,420.
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	68,397.
23	Other taxes, including self-employment tax, from Schedule 2, line 21.	23	1,706.
24	Add lines 22 and 23. This is your total tax .	24	70,103.

Payments

25	Federal income tax withheld from:		
a	Form(s) W-2.	25a	64,381.
b	Form(s) 1099.	25b	
c	Other forms (see instructions).	25c	
d	Add lines 25a through 25c.	25d	64,381.
26	2022 estimated tax payments and amount applied from 2021 return.	26	
27	Earned income credit (EIC).	27	
28	Additional child tax credit from Schedule 8812.	28	
29	American opportunity credit from Form 8863, line 8.	29	
30	Reserved for future use.	30	
31	Amount from Schedule 3, line 15.	31	
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits .	32	
33	Add lines 25d, 26, and 32. These are your total payments .	33	64,381.

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

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid .	34	
35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here. ☐	35a	
b	Routing number.	c	Type: ☐ Checking ☐ Savings
d	Account number.		
36	Amount of line 34 you want applied to your 2023 estimated tax .	36	

Direct deposit?
See instructions.

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	5,722.
38	Estimated tax penalty (see instructions).	38	

Third Party Designee

Do you want to allow another person to discuss this return with the IRS?
See instructions. ☒ **Yes**. Complete below. ☐ **No**

Designee's name	Scott A. Stein, CPA	Phone no.	561-686-1110	Personal identification number (PIN)	[REDACTED]
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Sign Here

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

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
Phone no. 561-659-8300	Email address		

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
Scott A. Stein, CPA	[Signature]	4/1/22	P00105599	
Firm's name	Firm's address	Phone no.	Firm's EIN	
DIVINE, BLALOCK, MARTIN & SELLARI, LLC	580 VILLAGE BLVD, SUITE 110 WEST PALM BEACH, FL 33409	561-686-1110	59-1498723	

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

Form 1040 (2022)

SCHEDULE 1
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Income and Adjustments to Income

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **01**

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

Your social security number

and Daliah Handel Weiss

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions):		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling	8b	
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Income from Form 8853	8e	
f	Income from Form 8889	8f	
g	Alaska Permanent Fund dividends	8g	
h	Jury duty pay	8h	
i	Prizes and awards	8i	
j	Activity not engaged in for profit income	8j	
k	Stock options	8k	
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l	
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m	
n	Section 951(a) inclusion (see instructions)	8n	
o	Section 951A(a) inclusion (see instructions)	8o	
p	Section 461(l) excess business loss adjustment	8p	
q	Taxable distributions from an ABLE account (see instructions)	8q	
r	Scholarship and fellowship grants not reported on Form W-2	8r	
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	()
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t	
u	Wages earned while incarcerated	8u	
z	Other income. List type and amount: <u>See Statement 2</u>	8z	311.
9	Total other income. Add lines 8a through 8z	9	311.
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	311.

Part II Adjustments to Income

11	Educator expenses	11	
12	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106.	12	
13	Health savings account deduction. Attach Form 8889.	13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903.	14	
15	Deductible part of self-employment tax. Attach Schedule SE.	15	
16	Self-employed SEP, SIMPLE, and qualified plans.	16	
17	Self-employed health insurance deduction.	17	
18	Penalty on early withdrawal of savings.	18	
19a	Alimony paid.	19a	
b	Recipient's SSN.		
c	Date of original divorce or separation agreement (see instructions):		
20	IRA deduction.	20	
21	Student loan interest deduction.	21	
22	Reserved for future use.	22	
23	Archer MSA deduction.	23	
24	Other adjustments:		
a	Jury duty pay (see instructions).	24a	
b	Deductible expenses related to income reported on line 8l from the rental of personal property engaged in for profit.	24b	
c	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8m.	24c	
d	Reforestation amortization and expenses.	24d	
e	Repayment of supplemental unemployment benefits under the Trade Act of 1974.	24e	
f	Contributions to section 501(c)(18)(D) pension plans.	24f	
g	Contributions by certain chaplains to section 403(b) plans.	24g	
h	Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions).	24h	
i	Attorney fees and court costs you paid in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations.	24i	
j	Housing deduction from Form 2555.	24j	
k	Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041).	24k	
z	Other adjustments. List type and amount:	24z	
25	Total other adjustments. Add lines 24a through 24z.	25	
26	Add lines 11 through 23 and 25. These are your adjustments to income . Enter here and on Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a.	26	0.

Schedule 1 (Form 1040) 2022

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

2022

Attachment
Sequence No. **02**

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

and Daliah Handel Weiss

Your social security number

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE.....	4	
5	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	Repayment of first-time homebuyer credit. Attach Form 5405 if required.....	10	
11	Additional Medicare Tax. Attach Form 8959.....	11	1,018.
12	Net investment income tax. Attach Form 8960.....	12	688.
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)

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

Schedule 2 (Form 1040) 2022

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	Reserved for future use	19	
20	Section 965 net tax liability installment from Form 965-A.	20	
21	Add lines 4, 7 through 16, and 18. These are your total other taxes . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b	21	1,706.

Schedule 2 (Form 1040) 2022

SCHEDULE 3
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Credits and Payments

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

OMB No. 1545-0074

2022

Attachment
Sequence No. 03

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

and Daliah Handel Weiss

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	420.
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441	2	
3	Education credits from Form 8863, line 19	3	
4	Retirement savings contributions credit. Attach Form 8880	4	
5	Residential energy credits. Attach Form 5695	5	
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800	6a	
b	Credit for prior year minimum tax. Attach Form 8801	6b	
c	Adoption credit. Attach Form 8839	6c	
d	Credit for the elderly or disabled. Attach Schedule R	6d	
e	Alternative motor vehicle credit. Attach Form 8910	6e	
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f	
g	Mortgage interest credit. Attach Form 8396	6g	
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h	
i	Qualified electric vehicle credit. Attach Form 8834	6i	
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j	
k	Credit to holders of tax credit bonds. Attach Form 8912	6k	
l	Amount on Form 8978, line 14. See instructions	6l	
z	Other nonrefundable credits. List type and amount:	6z	
7	Total other nonrefundable credits. Add lines 6a through 6z	7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20	8	420.

(continued on page 2)

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

Schedule 3 (Form 1040) 2022

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	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b	
c	Reserved for future use	13c	
d	Credit for repayment of amounts included in income from earlier years	13d	
e	Reserved for future use	13e	
f	Deferred amount of net 965 tax liability (see instructions)	13f	
g	Reserved for future use	13g	
h	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021	13h	
z	Other payments or refundable credits. List type and amount: _____	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	0.

Schedule 3 (Form 1040) 2022

SCHEDULE B
(Form 1040)

Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Interest and Ordinary Dividends

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **08**

and Daliah Handel Weiss

Your social security number

Part I

Interest

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

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

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

Morgan Stanley-
Prudential Tax Services LLC

Amount

1.
73.

1

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

2
3
4

74.
74.

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

Part II

**Ordinary
Dividends**

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

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

- 5 List name of payer:

Morgan Stanley-
Morgan Stanley-

Amount

89.
9,055.

5

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

6

9,144.

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

Part III

**Foreign
Accounts
and Trusts**

Caution: If required,
failure to file FinCEN
Form 114 may
result in substantial
penalties.
Additionally, you may
be required to file
Form 8938, Statement
of Specified Foreign
Financial Assets.
See instructions.

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2022, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions.
If 'Yes,' are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements.
b If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) are located:
8 During 2022, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If 'Yes,' you may have to file Form 3520. See instructions.

Yes	No
	X
	X

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

and Daliah Handel Weiss

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

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

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

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked.				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked.				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked.				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824.				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions.				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back.				7

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

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.	7,432.	51.		7,381.
8b Totals for all transactions reported on Form(s) 8949 with Box D checked.				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked.				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked.				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824.				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.				12
13 Capital gain distributions. See the instrs.				13 1,513.
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 8,894.

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	8,894.
• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.		
17 Are lines 15 and 16 both gains? ☒ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet	18	0.
19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet	19	
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: • 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.		

Schedule D (Form 1040) 2022

Foreign Tax Credit

(Individual, Estate, or Trust)

OMB No. 1545-0121

2022

Department of the Treasury
Internal Revenue Service

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

Go to www.irs.gov/Form1116 for instructions and the latest information.Attachment
Sequence No. 19

Name

ID no. as shown on page 1 of your tax return

and Daliah Handel Weiss

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

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

h Resident of (name of country) USA

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to **more than one** foreign country or U.S. possession, use a separate column and line for each country or possession.**Part I Taxable Income or Loss From Sources Outside the United States** (for category checked above)

	Foreign Country or U.S. Possession			Total (Add columns A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession	OTHER COUNTRY			
1 a Gross income from sources within country shown above and of the type checked above (see instructions): <u>See Statement 3</u>	2,229.			1 a 2,229.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions. ☐				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement).				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions).	25,900.			
b Other deductions (attach statement).				
c Add lines 3a and 3b.	25,900.			
d Gross foreign source income (see instructions).	2,229.			
e Gross income from all sources (see instructions).	370,352.			
f Divide line 3d by line 3e (see instructions).	0.006019			
g Multiply line 3c by line 3f.	156.			
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions).				
b Other interest expense.				
5 Losses from foreign sources.				
6 Add lines 2, 3g, 4a, 4b, and 5.	156.			6 156.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2.				7 2,073.

Part II Foreign Taxes Paid or Accrued (see instructions)

C O U N T R Y	Credit is claimed for taxes (you must check one) (j) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add columns (q) through (t))
		(l) Date paid or accrued	(m) Dividends	(n) Rents & royalties		(o) Interest	(q) Dividends	(r) Rents & royalties		
A	12/31/2022					197.				197.
B										
C										

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2. **8** 197.

BAA For Paperwork Reduction Act Notice, see instructions.

FDIZ2612L 09/26/22

Form 1116 (2022)

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I.	9	197.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. <i>See Stmt. 4.</i> (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10	120,467.	
11	Add lines 9 and 10	11	120,664.	
12	Reduction in foreign taxes (see instructions)	12		
13	Taxes reclassified under high tax kickout (see instructions)	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		120,664.
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions.	15	2,073.	
16	Adjustments to line 15 (see instructions)	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	2,073.	
18	Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption. Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	344,405.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19		0.006019076
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions. Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.	20		69,817.
21	Multiply line 20 by line 19 (maximum amount of credit)	21		420.
22	Increase in limitation (section 960(c))	22		
23	Add lines 21 and 22	23		420.
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV. See instructions.	24		420.

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

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31	32		
33	Enter the smaller of line 20 or line 32	33		420.
34	Reduction of credit for international boycott operations. See instructions for line 12.	34		
35	Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a	35		420.

Form 1116 (2022)

Foreign Tax Credit

(Individual, Estate, or Trust)

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

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

2022

Attachment
Sequence No. 19Department of the Treasury
Internal Revenue Service

Name

ID no. as shown on page 1 of your tax return

[REDACTED] and Daliah Handel Weiss

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

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

h Resident of (name of country) USA

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.**Part I Taxable Income or Loss From Sources Outside the United States** (for category checked above)

	Foreign Country or U.S. Possession			Total (Add columns A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession	OTHER COUNTRY			
1 a Gross income from sources within country shown above and of the type checked above (see instructions): See Statement 5	1,195.			1 a 1,195.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions ☐				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions)				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income (see instructions)	2,229.			
e Gross income from all sources (see instructions)	370,352.			
f Divide line 3d by line 3e (see instructions)	0.006019			
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5				6
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 1,195.

Part II Foreign Taxes Paid or Accrued (see instructions)

COUNTRY	Credit is claimed for taxes (you must check one) (i) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued						(u) Total foreign taxes paid or accrued (add columns (q) through (t))				
		In foreign currency			In U.S. dollars							
		(l) Date paid or accrued	(m) Dividends	(n) Rents & royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends		(r) Rents & royalties	(s) Interest	(t) Other foreign taxes paid or accrued	
A		12/31/2022					197.					197.
B												
C												

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 8 197.

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I.	9	197.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. <i>See Stmt. 6.</i> (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10	121,485.	
11	Add lines 9 and 10.	11	121,682.	
12	Reduction in foreign taxes (see instructions).	12		
13	Taxes reclassified under high tax kickout (see instructions).	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit.	14	121,682.	
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions.	15	1,195.	
16	Adjustments to line 15 (see instructions).	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	1,195.	
18	Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption. Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	362,506.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19	0.003296497	
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions. Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.	20	64,312.	
21	Multiply line 20 by line 19 (maximum amount of credit).	21	212.	
22	Increase in limitation (section 960(c)).	22		
23	Add lines 21 and 22.	23	212.	
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV. See instructions.	24	212.	

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

25	Credit for taxes on section 951A category income.	25		
26	Credit for taxes on foreign branch category income.	26		
27	Credit for taxes on passive category income.	27		
28	Credit for taxes on general category income.	28		
29	Credit for taxes on section 901(j) income.	29		
30	Credit for taxes on certain income re-sourced by treaty.	30		
31	Credit for taxes on lump-sum distributions.	31		
32	Add lines 25 through 31.	32		
33	Enter the smaller of line 20 or line 32.	33	212.	
34	Reduction of credit for international boycott operations. See instructions for line 12.	34		
35	Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a.	35	212.	

SCHEDULE B
(Form 1116)

(Rev. December 2022)

Department of the Treasury
Internal Revenue Service

Foreign Tax Carryover Reconciliation Schedule

For calendar year 2022, or other tax year beginning _____, and ending _____

See separate instructions.

Attach to Form 1116.

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

OMB No. 1545-0121

Name

and Daliah Handel Weiss

Identifying number as shown
on page 1 of your tax return

Use a separate Schedule B (Form 1116) for each applicable category of income listed below. See instructions. Check only one box on each schedule. Check the box for the same separate category code as that shown on the Form 1116 to which this Schedule B is attached.

a ☐ Reserved for future use **c** ☒ Passive category income **e** ☐ Section 901(j) income **g** ☐ Lump-sum distributions

b ☐ Foreign branch category income **d** ☐ General category income **f** ☐ Certain income re-sourced by treaty

h If box e is checked, enter the country code for the sanctioned country. See instructions.

i If box f is checked, enter the country code for the treaty country. See instructions.

Foreign Tax Carryover Reconciliation	(i) 10th Preceding Tax Year	(ii) 9th Preceding Tax Year	(iii) 8th Preceding Tax Year	(iv) 7th Preceding Tax Year	(v) 6th Preceding Tax Year	(vi) 5th Preceding Tax Year	(vii) Subtotal (add columns (i) through (vi))
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))					120,467.		120,467.
2 Adjustments to line 1 (enter description—see instructions):							
a Carryback adjustment (see instr.)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2)					120,467.		120,467.
4 Foreign tax carryover used in current tax year (enter as a negative number)					-223.		-223.
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.	-0-				120,244.		120,244.

BAA For Paperwork Reduction Act Notice, see the separate instructions.

FDZ2621 01/10/23

Schedule B (Form 1116) (Rev. 12-2022)

Foreign Tax Carryover Reconciliation (continued)		(viii) Subtotal from page 1 (enter the amounts from column (vii) on page 1)	(ix) 4th Preceding Tax Year	(x) 3rd Preceding Tax Year	(xi) 2nd Preceding Tax Year	(xii) 1st Preceding Tax Year	(xiii) Current Tax Year	(xiv) Totals (add columns (vii) through (xiii))
1	Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))							
2	Adjustments to line 1 (enter description—see instructions):	120,467.						120,467.
a	Carryback adjustment (see instr.)							
b	Adjustments for section 905(c) redeterminations (see instructions)							
c								
d								
e								
f								
g								
3	Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2). Include the column (xiv) total on the current year Form 1116, Part III, line 10.	120,467.						120,467.
4	Foreign tax carryover used in current tax year (enter as a negative number)	-223.						-223.
5	Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6	Foreign tax carryover generated in current tax year							
7	Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8	Foreign tax carryover to the following tax year. Combine lines 3 through 7.	120,244.						120,244.

BAA

Schedule B (Form 1116) (Rev. 12-2022)

SCHEDULE B
(Form 1116)

(Rev. December 2022)

Department of the Treasury
Internal Revenue Service

Foreign Tax Carryover Reconciliation Schedule

For calendar year 2022, or other tax year beginning _____, and ending _____

See separate instructions.

Attach to Form 1116.

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

OMB No. 1545-0121

Name

and Daliah Handel Weiss

Alternative Minimum Tax

Identifying number as shown
on page 1 of your tax return

Use a separate Schedule B (Form 1116) for each applicable category of income listed below. See instructions. Check only one box on each schedule.
Check the box for the same separate category code as that shown on the Form 1116 to which this Schedule B is attached.

a ☐ Reserved for future use **c** ☒ Passive category income **e** ☐ Section 901(j) income **g** ☐ Lump-sum distributions

b ☐ Foreign branch category income **d** ☐ General category income **f** ☐ Certain income re-sourced by treaty

h If box e is checked, enter the country code for the sanctioned country. See instructions.

i If box f is checked, enter the country code for the treaty country. See instructions.

Foreign Tax Carryover Reconciliation	(i) 10th Preceding Tax Year	(ii) 9th Preceding Tax Year	(iii) 8th Preceding Tax Year	(iv) 7th Preceding Tax Year	(v) 6th Preceding Tax Year	(vi) 5th Preceding Tax Year	(vii) Subtotal (add columns (i) through (vi))
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))					121,485.		121,485.
2 Adjustments to line 1 (enter description—see instructions):							
a Carryback adjustment (see instr.)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2)					121,485.		121,485.
4 Foreign tax carryover used in current tax year (enter as a negative number)					-15.		-15.
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.	-0-				121,470.		121,470.

BAA For Paperwork Reduction Act Notice, see the separate instructions.

FD-22621 01/10/23

Schedule B (Form 1116) (Rev. 12-2022)

Alternative Minimum Tax

	(viii) Subtotal from page 1 (enter the amounts from column (vii) on page 1)	(ix) 4th Preceding Tax Year	(x) 3rd Preceding Tax Year	(xi) 2nd Preceding Tax Year	(xii) 1st Preceding Tax Year	(xiii) Current Tax Year	(xiv) Totals (add columns (vii) through (xiii))
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))	121,485.						121,485.
2 Adjustments to line 1 (enter description—see instructions):							
a Carryback adjustment (see instr.)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2). Include the column (xiv) total on the current year Form 1116, Part III, line 10.	121,485.						121,485.
4 Foreign tax carryover used in current tax year (enter as a negative number)	-15.						-15.
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.	121,470.						121,470.

BAA

Schedule B (Form 1116) (Rev. 12-2022)

SCHEDULE 8812
(Form 1040)

Department of the Treasury
Internal Revenue Service

**Credits for Qualifying Children
and Other Dependents**

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

Go to www.irs.gov/Schedule8812 for instructions and the latest information.

OMB No. 1545-0074

2022

Attachment
Sequence No. **47**

Name(s) shown on return

Your social security number

and Daliah Handel Weiss

Part I Child Tax Credit and Credit for Other Dependents

1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR	1	370,352.
2a	Enter income from Puerto Rico that you excluded	2a	
b	Enter the amounts from lines 45 and 50 of your Form 2555	2b	
c	Enter the amount from line 15 of your Form 4563	2c	
d	Add lines 2a through 2c	2d	
3	Add lines 1 and 2d	3	370,352.
4	Number of qualifying children under age 17 with the required social security number	4	
5	Multiply line 4 by \$2,000	5	0.
6	Number of other dependents, including any qualifying children who are not under age 17 or who do not have the required social security number	6	2
Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4.			
7	Multiply line 6 by \$500	7	1,000.
8	Add lines 5 and 7	8	1,000.
9	Enter the amount shown below for your filing status. • Married filing jointly—\$400,000 • All other filing statuses—\$200,000	9	400,000.
10	Subtract line 9 from line 3. • If zero or less, enter -0-. • If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc.	10	0.
11	Multiply line 10 by 5% (0.05)	11	
12	Is the amount on line 8 more than the amount on line 11? ☐ No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. ☒ Yes. Subtract line 11 from line 8. Enter the result.	12	1,000.
13	Enter the amount from the Credit Limit Worksheet A	13	69,397.
14	Enter the smaller of line 12 or 13. This is your child tax credit and credit for other dependents. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.	14	1,000.

If the amount on line 12 is more than the amount on line 14, you may be able to take the **additional child tax credit** on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27 (also complete Schedule 3, line 11) before completing Part II-A.

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

Schedule 8812 (Form 1040) 2022

Part II-A Additional Child Tax Credit for All Filers**Caution:** If you file Form 2555, you cannot claim the additional child tax credit.

15 Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27. ☐		
16a Subtract line 14 from line 12. If zero, stop here ; you cannot take the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27.		16a 0.
b Number of qualifying children under 17 with the required social security number: _____ X \$1,500. Enter the result. If zero, stop here ; you cannot claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27.		16b
TIP: The number of children you use for this line is the same as the number of children you used for line 4.		
17 Enter the smaller of line 16a or line 16b.		17
18a Earned income (see instructions).		18a
b Nontaxable combat pay (see instructions).		18b
19 Is the amount on line 18a more than \$2,500? ☐ No. Leave line 19 blank and enter -0- on line 20. ☐ Yes. Subtract \$2,500 from the amount on line 18a. Enter the result.		19
20 Multiply the amount on line 19 by 15% (0.15) and enter the result. Next. On line 16b, is the amount \$4,500 or more? ☐ No. If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the smaller of line 17 or line 20 on line 27. ☐ Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. Otherwise, go to line 21.		20

Part II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Residents of Puerto Rico

21 Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, see instructions.		21
22 Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13.		22
23 Add lines 21 and 22.		23
24 1040 and 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27, and Schedule 3 (Form 1040), line 11. 1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11.		24
25 Subtract line 24 from line 23. If zero or less, enter -0-.		25
26 Enter the larger of line 20 or line 25. Next, enter the smaller of line 17 or line 26 on line 27.		26

Part II-C Additional Child Tax Credit

27 This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28.	27 0.
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Schedule 8812 (Form 1040) 2022

Investment Interest Expense Deduction

OMB No. 1545-0191

Department of the Treasury
Internal Revenue ServiceGo to www.irs.gov/Form4952 for the latest information.
Attach to your tax return.**2022**Attachment
Sequence No. **51**

Name(s) shown on return

Identifying number

and Daliah Handel Weiss

Part I Total Investment Interest Expense

1	Investment interest expense paid or accrued in 2022 (see instructions).....	1	
2	Disallowed investment interest expense from 2021 Form 4952, line 7.....	2	1.
3	Total investment interest expense. Add lines 1 and 2.....	3	1.

Part II Net Investment Income

4a	Gross income from property held for investment (excluding any net gain from the disposition of property held for investment).....	4a	9,218.	
b	Qualified dividends included on line 4a.....	4b	7,904.	
c	Subtract line 4b from line 4a.....	4c		1,314.
d	Net gain from the disposition of property held for investment.....	4d	8,894.	
e	Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment. See instructions.....	4e	8,894.	
f	Subtract line 4e from line 4d.....	4f		
g	Enter the amount from lines 4b and 4e that you elect to include in investment income. See instructions.....	4g		
h	Investment income. Add lines 4c, 4f, and 4g.....	4h		1,314.
5	Investment expenses (see instructions).....	5		
6	Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0-.....	6		1,314.

Part III Investment Interest Expense Deduction

7	Disallowed investment interest expense to be carried forward to 2023. Subtract line 6 from line 3. If zero or less, enter -0-.....	7		0.
8	Investment interest expense deduction. Enter the smaller of line 3 or line 6. See instructions.....	8		1.

BAA For Paperwork Reduction Act Notice, see separate instructions.

Form **4952** (2022)

Investment Interest Expense Deduction

Alternative Minimum Tax

Go to www.irs.gov/Form4952 for the latest information.

Attach to your tax return.

2022Attachment
Sequence No. **51**

Name(s) shown on return

Identifying number

[REDACTED] and Daliah Handel Weiss

Part I Total Investment Interest Expense

1	Investment interest expense paid or accrued in 2022 (see instructions).....	1	
2	Disallowed investment interest expense from 2021 Form 4952, line 7.....	2	
3	Total investment interest expense. Add lines 1 and 2.....	3	0.

Part II Net Investment Income

4a	Gross income from property held for investment (excluding any net gain from the disposition of property held for investment).....	4a	9,218.	
4b	Qualified dividends included on line 4a.....	4b	7,904.	
4c	Subtract line 4b from line 4a.....	4c		1,314.
4d	Net gain from the disposition of property held for investment.....	4d	8,894.	
4e	Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment. See instructions.....	4e	8,894.	
4f	Subtract line 4e from line 4d.....	4f		
4g	Enter the amount from lines 4b and 4e that you elect to include in investment income. See instructions.....	4g		
4h	Investment income. Add lines 4c, 4f, and 4g.....	4h		1,314.
5	Investment expenses (see instructions).....	5		
6	Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0-.....	6		1,314.

Part III Investment Interest Expense Deduction

7	Disallowed investment interest expense to be carried forward to 2023. Subtract line 6 from line 3. If zero or less, enter -0-.....	7	0.
8	Investment interest expense deduction. Enter the smaller of line 3 or line 6. See instructions.....	8	0.

BAA For Paperwork Reduction Act Notice, see separate instructions.

Form **4952** (2022)

Qualified Business Income Deduction

OMB No. 1545-2294

Department of the Treasury
Internal Revenue Service

Attach to your tax return.

Go to www.irs.gov/Form8995A for instructions and the latest information.**2022**Attachment
Sequence No. **55A**

Name(s) shown on return

Your taxpayer identification number

and Daliah Handel Weiss

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 \$170,050 (\$340,100 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 \$170,050 or less (\$340,100 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		

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

Form **8995-A** (2022)

Part III **Phased-in Reduction**

Complete Part III only if your taxable income is more than \$170,050 but not \$220,050 (\$340,100 and \$440,100 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 \$170,050 (\$340,100 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	236.		
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	236.		
31 REIT and PTP component. Multiply line 30 by 20% (0.20).....	31	47.		
32 Qualified business income deduction before the income limitation. Add lines 27 and 31.....	32		47.	
33 Taxable income before qualified business income deduction.....	33	344,452.		
34 Net capital gain. See instructions.....	34	16,798.		
35 Subtract line 34 from line 33. If zero or less, enter -0-.....	35		327,654.	
36 Income limitation. Multiply line 35 by 20% (0.20).....	36		65,531.	
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		47.	
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		47.	
40 Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-.....	40	()		

Form 8995-A (2022)

Paid Preparer's Due Diligence Checklist*Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC),
Child Tax Credit (CTC) (including the Additional Child Tax Credit (ACTC) and
Credit for Other Dependents (ODC)), and Head of Household (HOH) Filing Status***To be completed by preparer and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.
Go to www.irs.gov/Form8867 for instructions and the latest information.**

OMB No. 1545-0074

For tax year

20 22

Attachment
Sequence No. 70

Taxpayer name(s) shown on return

[REDACTED] and Daliah Handel Weiss

Taxpayer identification number

Preparer's name

Scott A. Stein, CPA

Preparer tax identification number

Part I Due Diligence RequirementsPlease check the appropriate box for the credit(s) and/or HOH filing status claimed on the return and complete the related Parts I–V for the benefit(s) claimed (check all that apply). ☐ EIC ☒ CTC/ACTC/ODC ☐ AOTC ☐ HOH

	Yes	No	N/A
1 Did you complete the return based on information for the applicable tax year provided by the taxpayer or reasonably obtained by you? (See instructions if relying on prior year earned income.)	☐	☒	
2 If credits are claimed on the return, did you complete the applicable EIC and/or CTC/ACTC/ODC worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Schedule 8812 (Form 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instructions, or your own worksheet(s) that provides the same information, and all related forms and schedules for each credit claimed?	☒	☐	☐
3 Did you satisfy the knowledge requirement? To meet the knowledge requirement, you must do both of the following.			
• Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's responses to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status.			
• Review information to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of any credit(s).	☒	☐	
4 Did any information provided by the taxpayer or a third party for use in preparing the return, or information reasonably known to you, appear to be incorrect, incomplete, or inconsistent? (If "Yes," answer questions 4a and 4b. If "No," go to question 5.)	☐	☒	
a Did you make reasonable inquiries to determine the correct, complete, and consistent information?	☐	☐	
b Did you contemporaneously document your inquiries? (Documentation should include the questions you asked, whom you asked, when you asked, the information that was provided, and the impact the information had on your preparation of the return.)	☐	☐	
5 Did you satisfy the record retention requirement? To meet the record retention requirement, you must keep a copy of your documentation referenced in question 4b, a copy of this Form 8867, a copy of any applicable worksheet(s), a record of how, when, and from whom the information used to prepare Form 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) provided by the taxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing status or to figure the amount(s) of the credit(s).	☒	☐	
List those documents provided by the taxpayer, if any, that you relied on:			
6 Did you ask the taxpayer whether he/she could provide documentation to substantiate eligibility for the credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return if his/her return is selected for audit?	☒	☐	
7 Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous year?	☒	☐	☐
(If credits were disallowed or reduced, go to question 7a; if not, go to question 8.)			
a Did you complete the required recertification Form 8862?	☐	☐	☐
8 If the taxpayer is reporting self-employment income, did you ask questions to prepare a complete and correct Schedule C (Form 1040)?	☐	☐	☒

BAA For Paperwork Reduction Act Notice, see separate instructions.

Form 8867 (Rev. 11-2022)

Part II Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go to Part III.)

	Yes	No	N/A
9a Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.)	☐	☐	
b Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer has supported the child the entire year?	☐	☐	
c Did you explain to the taxpayer the rules about claiming the EIC when a child is the qualifying child of more than one person (tiebreaker rules)?	☐	☐	☐

Part III Due Diligence Questions for Returns Claiming CTC/ACTC/ODC (If the return does not claim CTC, ACTC, or ODC, go to Part IV.)

	Yes	No	N/A
10 Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is a citizen, national, or resident of the United States?	☒	☐	
11 Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child?	☒	☐	☐
12 Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return?	☒	☐	☐

Part IV Due Diligence Questions for Returns Claiming AOTC (If the return does not claim AOTC, go to Part V.)

	Yes	No
13 Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qualified tuition and related expenses for the claimed AOTC?	☐	☐

Part V Due Diligence Questions for Claiming HOH (If the return does not claim HOH filing status, go to Part VI.)

	Yes	No
14 Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax year and provided more than half of the cost of keeping up a home for the year for a qualifying person?	☐	☐

Part VI Eligibility Certification

You will have complied with all due diligence requirements for claiming the applicable credit(s) and/or HOH filing status on the return of the taxpayer identified above if you:

- Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's responses on the return or in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s);
- Complete this Form 8867 truthfully and accurately and complete the actions described in this checklist for any applicable credit(s) claimed and HOH filing status, if claimed;
- Submit Form 8867 in the manner required; **and**
- Keep all five of the following records for 3 years from the latest of the dates specified in the Form 8867 instructions under *Document Retention*.
 - A copy of this Form 8867.
 - The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.
 - Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).
 - A record of how, when, and from whom the information used to prepare this form and the applicable worksheet(s) was obtained.
 - A record of any additional information you relied upon, including questions you asked and the taxpayer's responses, to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).

If you have not complied with all due diligence requirements, you may have to pay a penalty for each failure to comply related to a claim of an applicable credit or HOH filing status (see instructions for more information).

	Yes	No
15 Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct, and complete?	☒	☐

Form **8959**Department of the Treasury
Internal Revenue Service**Additional Medicare Tax**

If any line does not apply to you, leave it blank. See separate instructions.
 Attach to Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.
 Go to www.irs.gov/Form8959 for instructions and the latest information.

OMB No. 1545-0074

2022Attachment
Sequence No. **71**

Name(s) shown on return

Your social security number

[REDACTED] and Daliah Handel Weiss

[REDACTED]

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5...	1	363,143.	
2	Unreported tips from Form 4137, line 6	2		
3	Wages from Form 8919, line 6	3		
4	Add lines 1 through 3	4	363,143.	
5	Enter the following amount for your filing status: Married filing jointly..... \$250,000 Married filing separately..... \$125,000 Single, Head of household, or Qualifying surviving spouse..... \$200,000	5	250,000.	
6	Subtract line 5 from line 4. If zero or less, enter -0-	6		113,143.
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II	7		1,018.

Part II Additional Medicare Tax on Self-Employment Income

8	Self-employment income from Schedule SE (Form 1040), Part I, line 6. If you had a loss, enter -0- (Form 1040-PR or 1040-SS filers, see instructions.)	8		
9	Enter the following amount for your filing status: Married filing jointly..... \$250,000 Married filing separately..... \$125,000 Single, Head of household, or Qualifying surviving spouse..... \$200,000	9		
10	Enter the amount from line 4	10		
11	Subtract line 10 from line 9. If zero or less, enter -0-	11		
12	Subtract line 11 from line 8. If zero or less, enter -0-	12		
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III	13		

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RRTA) Compensation

14	Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14		
15	Enter the following amount for your filing status: Married filing jointly..... \$250,000 Married filing separately..... \$125,000 Single, Head of household, or Qualifying surviving spouse..... \$200,000	15		
16	Subtract line 15 from line 14. If zero or less, enter -0-	16		
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV	17		

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-PR or 1040-SS filers, see instructions), and go to Part V	18		1,018.
----	---	----	--	--------

Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	5,266.	
20	Enter the amount from line 1	20	363,143.	
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	5,266.	
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-PR or 1040-SS filers, see instructions)	24		

**Net Investment Income Tax –
Individuals, Estates, and Trusts**

Attach to your tax return.

Go to www.irs.gov/Form8960 for instructions and the latest information.**2022**Attachment
Sequence No. **72**

Name(s) shown on your tax return

Your social security number or EIN

[REDACTED] and Daliah Handel Weiss

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	74.
2	Ordinary dividends (see instructions)	2	9,144.
3	Annuities (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, 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	8,894.
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	8,894.
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	18,112.

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	18,112.
Individuals:			
13	Modified adjusted gross income (see instructions)	13	370,352.
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	120,352.
16	Enter the smaller of line 12 or line 15.	16	18,112.
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	688.
Estates and Trusts:			
18a	Net investment income (line 12 above)	18a	
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b	
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-	18c	
19a	Adjusted gross income (see instructions)	19a	
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b	
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c	
20	Enter the smaller of line 18c or line 19c.	20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions)	21	

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

Form **8960** (2022)

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss [REDACTED]

Statement 1
Form 1040, Line 16
Tax

ECR..... 1,000.

Statement 2
Schedule 1, Line 8z
Other Income

PS 58..... \$ 311.
 Total \$ 311.

Statement 3
Form 1116, Line 1a - Passive Category Income
Gross Income From Sources Outside U.S.

Foreign country or U.S. possession: OTHER COUNTRY

Foreign Source Qualified Dividends..... \$ 716.
 Foreign Source Capital Gain Distributions..... 1,513.
 Total \$ 2,229.

Statement 4
Form 1116, Line 10
Foreign Tax Credit Carryovers

Passive Income

	Foreign Taxes Paid	Foreign Taxes Disallowed	Foreign Taxes Claimed	Foreign Tax Credit Carryover
2021 Foreign tax credit	177.	0.	177.	0.
2020 Foreign tax credit	178.	0.	178.	0.
2019 Foreign tax credit	190.	0.	190.	0.
2018 Foreign tax credit	186.	0.	186.	0.
2017 Foreign tax credit	187.	0.	187.	0.
2016 Foreign tax credit	123,116.	0.	2,649.	120,467.
2015 Foreign tax credit	0.	0.	0.	0.
2014 Foreign tax credit	0.	0.	0.	0.
2013 Foreign tax credit	0.	0.	0.	0.
2012 Foreign tax credit	0.	0.	0.	0.

Total Foreign Tax Credit Carryover - Form 1116, Line 10 \$ 120,467.

Client WEISS [REDACTED] and Daliah Handel Weiss [REDACTED]

Statement 5
Form 1116, Line 1a - Passive Category Income (AMT)
Gross Income From Sources Outside U.S.

Foreign country or U.S. possession: **OTHER COUNTRY**

Foreign Source Qualified Dividends.....	\$	384.
Foreign Source Capital Gain Distributions.....		811.
Total	\$	<u>1,195.</u>

Statement 6
Form 1116, Line 10
Foreign Tax Credit Carryovers

Passive Income - AMT

	<u>Foreign Taxes Paid</u>	<u>Foreign Taxes Disallowed</u>	<u>Foreign Taxes Claimed</u>	<u>Foreign Tax Credit Carryover</u>
2021 Foreign tax credit	177.	0.	177.	0.
2020 Foreign tax credit	178.	0.	178.	0.
2019 Foreign tax credit	190.	0.	190.	0.
2018 Foreign tax credit	186.	0.	186.	0.
2017 Foreign tax credit	187.	0.	187.	0.
2016 Foreign tax credit	123,116.	0.	1,631.	121,485.
2015 Foreign tax credit	0.	0.	0.	0.
2014 Foreign tax credit	0.	0.	0.	0.
2013 Foreign tax credit	0.	0.	0.	0.
2012 Foreign tax credit	0.	0.	0.	0.

Total Foreign Tax Credit Carryover - Form 1116, Line 10	\$	<u>121,485.</u>
---	----	-----------------

Form **8879**(Rev. January 2021)
Department of the Treasury
Internal Revenue Service**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

[REDACTED] Weiss

Social security number

[REDACTED]

Spouse's name

Daliah Handel Weiss

Spouse's social security number

[REDACTED]

Part I Tax Return Information – Tax Year Ending December 31, 2022 (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	370,352.
2	Total tax.....	2	70,103.
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099.....	3	64,381.
4	Amount you want refunded to you.....	4	
5	Amount you owe.....	5	5,722.

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 DIVINE, BLALOCK, MARTIN & SELLARI, LLC to enter or generate my PIN [REDACTED] as my
ERO firm name Enter five digits, but don't enter all zeros

signature on the income tax return (original or amended) I am now authorizing.

☐ 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 DIVINE, BLALOCK, MARTIN & SELLARI, LLC to enter or generate my PIN [REDACTED] as my
ERO firm name Enter five digits, but don't enter all zeros

signature on the income tax return (original or amended) I am now authorizing.

☐ 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 ►

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.

[REDACTED]
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 ► 4/10/22

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

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

Form 8879 (Rev. 01-2021)

File only if you are making a payment with Form 1040. Return this voucher with check or money order payable to the "United States Treasury." Please write your social security number, daytime phone number, and "2022 Form 1040" on your check or money order. Please do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Make your check payable to the "United States Treasury" and mail Form 1040-V payments to:

Internal Revenue Service
P.O. Box 1214
Charlotte, NC 28201-1214

Form 1040-V (2022)

▼ Detach Here and Mail With Your Payment and Return ▼

Department of the Treasury
Internal Revenue Service

2022

Form 1040-V Payment Voucher

- ▶ Use this voucher when making a payment with Form 1040.
- ▶ Do not staple this voucher or your payment to Form 1040.
- ▶ Make your check or money order payable to the "United States Treasury."
- ▶ Write your social security number (SSN) on your check or money order.

Enter the amount
of your payment ▶

5,722.

FDIA8601L 07/19/22 1032

& DALIAH HANDEL WEISS

INTERNAL REVENUE SERVICE
P.O. BOX 1214
CHARLOTTE NC 28201-1214

	2022	2021	Diff
INCOME			
Wages, salaries, tips, etc.....	351,929	324,803	27,126
Interest income.....	74	1	73
Dividend income.....	9,144	9,523	-379
Capital gain or loss.....	8,894	9,636	-742
Other income.....	311	275	36
Total income.....	370,352	344,238	26,114
ADJUSTMENTS TO INCOME			
Total adjustments.....	0	0	0
Adjusted gross income.....	370,352	344,238	26,114
ITEMIZED DEDUCTIONS			
Taxes.....	2,524	10,000	-7,476
Interest.....	7,524	7,714	-190
Contributions.....	700	647	53
Total itemized deductions.....	10,748	18,361	-7,613
TAX COMPUTATION			
Standard deduction.....	25,900	25,100	800
Charitable contr. if taking standard ded	0	600	-600
Larger of itemized or standard deduction	25,900	25,700	200
Qualified business income deduction.....	47	40	7
Taxable income.....	344,405	318,498	25,907
Tax before credits.....	69,817	62,909	6,908
CREDITS			
Child tax credit & other dependent cr....	1,000	1,000	0
Foreign tax credit.....	420	625	-205
Total credits.....	1,420	1,625	-205
Tax after credits.....	68,397	61,284	7,113
OTHER TAXES			
Other taxes.....	1,706	1,500	206
Total tax.....	70,103	62,784	7,319
PAYMENTS & REFUNDABLE CREDITS			
Federal income tax withheld.....	64,381	53,738	10,643
Total payments.....	64,381	53,738	10,643
REFUND OR AMOUNT DUE			
Amount you owe.....	5,722	9,046	-3,324
TAX RATES			
Marginal tax rate.....	24.0%	24.0%	0.0%
Effective tax rate.....	20.4%	19.7%	0.7%

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Forms needed for this return

Federal: 1040, Sch 1, Sch 2, Sch 3, 1040-ES, 1040-V, Sch B, Sch D, 1116
 1116 Sch B*, 4952, 8812, 8867, 8879, 8959, 8960, 8995-A

* Indicates a form that will be auto-attached

Tax Rates

	<u>Marginal</u>	<u>Effective</u>
Federal	24.0%	20.4%

Carryovers to 2023Federal Carryovers

Foreign Tax Credit	120,244.
AMT Foreign Tax Credit	121,470.

Estimates**Federal Estimates**

	<u>Estimate</u>	<u>Overpayment</u>	<u>Balance</u>
4/18/23	3,190.	0.	3,190.
6/15/23	3,190.	0.	3,190.
9/15/23	3,190.	0.	3,190.
1/16/24	3,190.	0.	3,190.
Total	\$ 12,760.	\$ 0.	\$ 12,760.

2023

Record of Estimated Tax Payments

Page 1

Client WEISS [REDACTED] and Daliah Handel Weiss

Federal

Payment Number	Date Due	2022 Overpayment Credit Applied	Balance Due	Check or money order number or credit card confirmation number	Amount Paid (do not include any credit card convenience fee)	Date paid
1	4/18/23		3,190.			
2	6/15/23		3,190.			
3	9/15/23		3,190.			
4	1/16/24		3,190.			
5						
6						
7						
8						
Total.....			12,760.			

State: _____

State

Payment Number	Date Due	2022 Overpayment Credit Applied	Balance Due	Check or money order number or credit card confirmation number	Amount Paid (do not include any credit card convenience fee)	Date paid
1						
2						
3						
4						
5						
6						
7						
8						
Total.....						

This document is for your records. Please use it to record your estimated tax payments and bring it with you for reference in the preparation of your 2023 tax return.

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Wage Schedule

<u>Taxpayer - Employer</u>	<u>Wages</u>	<u>Federal W/H</u>	<u>FICA</u>	<u>Medi- care</u>	<u>State W/H</u>	<u>Local W/H</u>
[REDACTED]	194,260.	44,158.	9,114.	2,817.		
Total	194,260.	44,158.	9,114.	2,817.	0.	0.
<u>Spouse - Employer</u>	<u>Wages</u>	<u>Federal W/H</u>	<u>FICA</u>	<u>Medi- care</u>	<u>State W/H</u>	<u>Local W/H</u>
State of Florida	157,669.	20,223.	9,114.	2,449.		
Total	157,669.	20,223.	9,114.	2,449.	0.	0.
Grand Total	351,929.	64,381.	18,228.	5,266.	0.	0.

Form 1040, 1040-SR, or 1040-NR, Line 3a
Qualified Dividends

Morgan Stanley-[REDACTED]	89.
Morgan Stanley-[REDACTED]	7,815.
Total	<u>7,904.</u>

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

QTP Distribution Worksheet

Beneficiary - [REDACTED] Weiss

1. Total distributed earnings from QTP's	4,231.
2. Adjusted higher education expenses allocated to QTP's	14,500.
3. Adjusted elementary and secondary school expenses allocated to QTP's (\$10,000 max)	0.
4. Total adjusted education expenses allocated to QTP's	14,500.
5. Total amount of QTP's distributed	14,500.
6. QTP factor (divide line 4 by line 5)	1.0000
7. Nontaxable amount of QTP earnings (line 1 x line 6)	4,231.
8. Taxable amount of QTP earnings (subtract line 7 from line 1)	0.
9. Taxable rollovers	0.
10. Taxable amount of all QTP's (add line 8 and 9)	<u>0.</u>

Beneficiary - [REDACTED] Weiss

1. Total distributed earnings from QTP's	4,040.
2. Adjusted higher education expenses allocated to QTP's	8,500.
3. Adjusted elementary and secondary school expenses allocated to QTP's (\$10,000 max)	0.
4. Total adjusted education expenses allocated to QTP's	8,500.
5. Total amount of QTP's distributed	8,500.
6. QTP factor (divide line 4 by line 5)	1.0000
7. Nontaxable amount of QTP earnings (line 1 x line 6)	4,040.
8. Taxable amount of QTP earnings (subtract line 7 from line 1)	0.
9. Taxable rollovers	0.
10. Taxable amount of all QTP's (add line 8 and 9)	<u>0.</u>

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Qualified Dividends and Capital Gain Tax Worksheet (Form 1040, 1040-SR, or 1040-NR, Line 16)

1. Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 15	344,405.
2. Enter amount from Form 1040, 1040-SR, or 1040-NR, line 3a	7,904.
3. Are you filing Schedule D? [X] Yes. Enter the smaller of line 15 or 16 of Schedule D, but do not enter less than zero [] No. Enter amount from Form 1040, 1040-SR, or 1040-NR, line 7	8,894.
4. Add lines 2 and 3	16,798.
5. Subtract line 4 from line 1. If 0 or less, enter 0.	327,607.
6. Enter: \$41,675 if single or married filing separately, \$83,350 if married filing jointly or qualifying surviving spouse, \$55,800 if head of household	83,350.
7. Enter the smaller of line 1 or line 6	83,350.
8. Enter the smaller of line 5 or line 7	83,350.
9. Subtract line 8 from line 7. This amount is taxed at 0%	0.
10. Enter the smaller of line 1 or line 4	16,798.
11. Enter the amount from line 9	0.
12. Subtract line 11 from line 10	16,798.
13. Enter: \$459,750 if single, \$258,600 if married filing separately, \$517,200 if married filing jointly or qualifying surviving spouse, \$488,500 if head of household.	517,200.
14. Enter the smaller of line 1 or line 13	344,405.
15. Add lines 5 and 9	327,607.
16. Subtract line 15 from line 14. If 0 or less, enter 0.	16,798.
17. Enter the smaller of line 12 or line 16	16,798.
18. Multiply line 17 by 15% (.15)	2,520.
19. Add lines 9 and 17	16,798.
20. Subtract line 19 from line 10	0.
21. Multiply line 20 by 20% (.20)	0.
22. Figure the tax on the amount on line 5. (Use the Tax Table or Tax Computation Worksheet)	66,297.
23. Add lines 18, 21, and 22	68,817.
24. Figure the tax on the amount on line 1. (Use the Tax Table or Tax Computation Worksheet)	70,673.
25. Tax on all taxable income (including capital gain distributions). Enter the smaller of line 23 or line 24 here and on Form 1040, 1040-SR, or 1040-NR, line 16	<u>68,817.</u>

Education Credit Recapture (Form 1040 or 1040-SR, line 16)

	A. As Reported	B. Recomputed
1. American Opportunity Credit	4,563.	2,063.
Lifetime Learning Credit:		
2. Total Qualified Expenses	0.	0.
3. Enter the smaller of line 2 or \$10,000	0.	0.
4. Lifetime Learning Credit (Line 3 x 20%)	0.	0.
American Opportunity Credit:		

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Education Credit Recapture (Form 1040 or 1040-SR, line 16) (continued)

5. American Opportunity Credit	4,563.	2,063.
6. Phase-out %		
7. American Opportunity Credit after phase-out %	4,563.	2,063.
8. Refundable AOC (line 7 x 40%)	1,825.	825.
Allowable Nonrefundable Education Credit:		
9. Nonrefundable AOC (line 7 minus line 8)	2,738.	1,238.
10. Tentative LLC Credit	0.	0.
11. Phase-out %	0.000	0.000
12. LLC Credit after phase-out	0.	0.
13. Education Credits before tax limitation (add line 9 and 12)	2,738.	1,238.
14. Total Tax Due Less Credits	0.	0.
15. Nonrefundable Education Credits (smaller of line 13 or 14)	0.	0.
16. Total Education Credit (add line 8 and 15)	1,825.	825.
17. Education Credit Recapture (line 16A minus 16B)		<u>1,000.</u>

Credit Limit Worksheet A (Schedule 8812)

1. Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 18.	69,817.
2. Add the amounts from:	
Schedule 3, line 1	420.
Schedule 3, line 2	0.
Schedule 3, line 3	0.
Schedule 3, line 4	0.
Schedule 3, line 6d	0.
Schedule 3, line 6e	0.
Schedule 3, line 6f	0.
Schedule 3, line 6l	0.
Form 5695, line 30	0.
Enter the total.	420.
3. Subtract line 2 from line 1.	69,397.
Complete Credit Limit Worksheet B only if you meet all of the following:	
1. You are claiming one or more of the following credits.	
a. Mortgage interest credit, Form 8396.	
b. Adoption credit, Form 8839.	
c. Residential clean energy credit, Form 5695, Part I.	
d. District of Columbia first-time homebuyer credit, Form 8859.	
2. You are not filing Form 2555.	
3. Line 4 of Schedule 8812 is more than zero.	
4. If you are not completing Credit Limit Worksheet B, enter 0; otherwise, enter the amount from Credit Limit Worksheet B	0.
5. Subtract line 4 from line 3. Enter here and on Schedule 8812, line 13.	69,397.

Federal Income Tax Withheld

[REDACTED]	44,158.
State of Florida	20,223.
Total	<u>64,381.</u>

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Form 1116, Page 1, Line 3d
Gross Foreign Source Income

Category of income - Passive

OTHER COUNTRY

Gross qualifying dividends.....	\$	716.
Gross capital gain distributions.....		1,513.
Total	\$	<u>2,229.</u>

Form 1116, Page 1, Line 3e
Gross Income from All Sources

Wages, salaries, tips, etc.....	351,929.
Taxable interest.....	74.
Ordinary dividends.....	9,144.
Capital gain and other gains.....	8,894.
Other income - Schedule 1, Line 8 before NOL and Foreign Exclusion.....	311.
Total	\$ <u>370,352.</u>

Taxable Income Limitation (AMT) (Form 1116, Line 18)
(Taxpayers who completed Part III of Form 6251)

1. Enter the amount from Form 6251, line 4	370,305.
2. Enter your worldwide 28% gains	N/A
3. Multiply line 2 by N/A	N/A
4. Enter your worldwide 25% gains (Form 6251, Line 36)	0.
5. Multiply line 4 by 0.1071	0.
6. Enter worldwide 20% gains & qual. div. (Form 6251, Line 33)	0.
7. Multiply line 6 by 0.2857	0.
8. Enter worldwide 15% gains & qual. div. (Form 6251, Line 30)	16,798.
9. Multiply line 8 by 0.4643	7,799.
10. Enter worldwide 0% gains & qual. div. (Form 6251, Line 23)	0.
11. Add lines 3, 5, 7, 9 and 10	7,799.
12. Subtract line 11 from line 1. Enter on Form 1116, line 18	<u>362,506.</u>

Foreign Tax Credit Carryover Utilization Worksheet
(Form 1116 - Taxpayers claiming a carryover of foreign tax credit)

Passive Income

Step 1 - Calculate your creditable taxes for the current year

1. Enter the total foreign taxes paid/accrued (Form 1116, ln. 9)	197.
2. less: Reduction in foreign taxes (Form 1116, ln. 12)	<u>0.</u>
3. Subtract ln. 2 from ln. 1. These are your 2022 taxes available for credit.	<u>197.</u>

Step 2 - Figure your deduction for the current year and carryover(s) to the next year

4. Enter the allowable deduction (Form 1116, ln. 24)	420.
--	------

2022

Remainder

Deduct this
yearCarryover to
next year

5. Enter the smaller of ln. 3 or ln. 4

197.

Client WEISS and Daliah Handel Weiss

Foreign Tax Credit Carryover Utilization Worksheet (continued)
(Form 1116 - Taxpayers claiming a carryover of foreign tax credit)

6. Subtract ln. 5 from ln. 3			0.
7. Subtract ln. 5 from ln. 4	223.		
<u>2012</u>			
8. Enter the carryover from 2012	0.		
9. Enter the smaller of ln. 7 or ln. 8		0.	
10. Subtract ln. 9 from ln. 8			EXPIRED
11. Subtract ln. 9 from ln. 7	223.		
<u>2013</u>			
12. Enter the carryover from 2013	0.		
13. Enter the smaller of ln. 11 or ln. 12		0.	
14. Subtract ln. 13 from ln. 12			0.
15. Subtract ln. 13 from ln. 11	223.		
<u>2014</u>			
16. Enter the carryover from 2014	0.		
17. Enter the smaller of ln. 15 or ln. 16		0.	
18. Subtract ln. 17 from ln. 16			0.
19. Subtract ln. 17 from ln. 15	223.		
<u>2015</u>			
20. Enter the carryover from 2015	0.		
21. Enter the smaller of ln. 19 or ln. 20		0.	
22. Subtract ln. 21 from ln. 20			0.
23. Subtract ln. 21 from ln. 19	223.		
<u>2016</u>			
24. Enter the carryover from 2016	120,467.		
25. Enter the smaller of ln. 23 or ln. 24		223.	
26. Subtract ln. 25 from ln. 24			120,244.
27. Subtract ln. 25 from ln. 23	0.		
<u>2017</u>			
28. Enter the carryover from 2017	0.		
29. Enter the smaller of ln. 27 or ln. 28		0.	
30. Subtract ln. 29 from ln. 28			0.
31. Subtract ln. 29 from ln. 27	0.		
<u>2018</u>			
32. Enter the carryover from 2018	0.		
33. Enter the smaller of ln. 31 or ln. 32		0.	
34. Subtract ln. 33 from ln. 32			0.
35. Subtract ln. 33 from ln. 31	0.		
<u>2019</u>			
36. Enter the carryover from 2019	0.		
37. Enter the smaller of ln. 35 or ln. 36		0.	
38. Subtract ln. 37 from ln. 36			0.
39. Subtract ln. 37 from ln. 35	0.		
<u>2020</u>			
40. Enter the carryover from 2020	0.		
41. Enter the smaller of ln. 39 or ln. 40		0.	
42. Subtract ln. 41 from ln. 40			0.
43. Subtract ln. 41 from ln. 39	0.		
<u>2021</u>			
44. Enter the carryover from 2021	0.		
45. Enter the smaller of ln. 43 or ln. 44		0.	
46. Subtract ln. 45 from ln. 44			0.

Client WEISS and Daliah Handel Weiss

Foreign Tax Credit Carryover Utilization Worksheet
(Form 1116 - Taxpayers claiming a carryover of foreign tax credit)
Passive Income - AMT**Step 1 - Calculate your creditable taxes for the current year**

1. Enter the total foreign taxes paid/accrued (Form 1116, ln. 9) 197.
2. less: Reduction in foreign taxes (Form 1116, ln. 12) 0.
3. Subtract ln. 2 from ln. 1. These are your 2022 taxes available for credit. 197.

Step 2 - Figure your deduction for the current year and carryover(s) to the next year

4. Enter the allowable deduction (Form 1116, ln. 24) 212.

	Remainder	Deduct this year	Carryover to next year
<u>2022</u>			
5. Enter the smaller of ln. 3 or ln. 4		197.	
6. Subtract ln. 5 from ln. 3			0.
7. Subtract ln. 5 from ln. 4	15.		
<u>2012</u>			
8. Enter the carryover from 2012	0.		
9. Enter the smaller of ln. 7 or ln. 8		0.	
10. Subtract ln. 9 from ln. 8			EXPIRED
11. Subtract ln. 9 from ln. 7	15.		
<u>2013</u>			
12. Enter the carryover from 2013	0.		
13. Enter the smaller of ln. 11 or ln. 12		0.	
14. Subtract ln. 13 from ln. 12			0.
15. Subtract ln. 13 from ln. 11	15.		
<u>2014</u>			
16. Enter the carryover from 2014	0.		
17. Enter the smaller of ln. 15 or ln. 16		0.	
18. Subtract ln. 17 from ln. 16			0.
19. Subtract ln. 17 from ln. 15	15.		
<u>2015</u>			
20. Enter the carryover from 2015	0.		
21. Enter the smaller of ln. 19 or ln. 20		0.	
22. Subtract ln. 21 from ln. 20			0.
23. Subtract ln. 21 from ln. 19	15.		
<u>2016</u>			
24. Enter the carryover from 2016	121,485.		
25. Enter the smaller of ln. 23 or ln. 24		15.	
26. Subtract ln. 25 from ln. 24			121,470.
27. Subtract ln. 25 from ln. 23	0.		
<u>2017</u>			
28. Enter the carryover from 2017	0.		
29. Enter the smaller of ln. 27 or ln. 28		0.	
30. Subtract ln. 29 from ln. 28			0.
31. Subtract ln. 29 from ln. 27	0.		
<u>2018</u>			
32. Enter the carryover from 2018	0.		
33. Enter the smaller of ln. 31 or ln. 32		0.	
34. Subtract ln. 33 from ln. 32			0.
35. Subtract ln. 33 from ln. 31	0.		
<u>2019</u>			
36. Enter the carryover from 2019	0.		

Client WEISS [REDACTED] and Daliah Handel Weiss

Foreign Tax Credit Carryover Utilization Worksheet (continued)
(Form 1116 - Taxpayers claiming a carryover of foreign tax credit)

37. Enter the smaller of ln. 35 or ln. 36		0.	
38. Subtract ln. 37 from ln. 36			0.
39. Subtract ln. 37 from ln. 35	0.		
2020			
40. Enter the carryover from 2020	0.		
41. Enter the smaller of ln. 39 or ln. 40		0.	
42. Subtract ln. 41 from ln. 40			0.
43. Subtract ln. 41 from ln. 39	0.		
2021			
44. Enter the carryover from 2021	0.		
45. Enter the smaller of ln. 43 or ln. 44		0.	
46. Subtract ln. 45 from ln. 44			0.

Foreign Tax Credit Carryover Summary
(Form 1116 - Foreign Tax Credit Carryovers to 2023)**Passive Income**

	<u>Foreign Taxes Paid</u>	<u>Foreign Taxes Disallowed</u>	<u>Foreign Taxes Claimed</u>	<u>Foreign Tax Credit Carryover</u>
Carryover from 2022	197.	0.	197.	0.
Carryover from 2021	177.	0.	177.	0.
Carryover from 2020	178.	0.	178.	0.
Carryover from 2019	190.	0.	190.	0.
Carryover from 2018	186.	0.	186.	0.
Carryover from 2017	187.	0.	187.	0.
Carryover from 2016	123,116.	0.	2,872.	120,244.
Carryover from 2015	0.	0.	0.	0.
Carryover from 2014	0.	0.	0.	0.
Carryover from 2013	0.	0.	0.	0.

Passive Income - AMT

	<u>Foreign Taxes Paid</u>	<u>Foreign Taxes Disallowed</u>	<u>Foreign Taxes Claimed</u>	<u>Foreign Tax Credit Carryover</u>
Carryover from 2022	197.	0.	197.	0.
Carryover from 2021	177.	0.	177.	0.
Carryover from 2020	178.	0.	178.	0.
Carryover from 2019	190.	0.	190.	0.
Carryover from 2018	186.	0.	186.	0.
Carryover from 2017	187.	0.	187.	0.
Carryover from 2016	123,116.	0.	1,646.	121,470.
Carryover from 2015	0.	0.	0.	0.
Carryover from 2014	0.	0.	0.	0.
Carryover from 2013	0.	0.	0.	0.

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Gross Investment Income (Form 4952, Line 4a)

Interest Income	74.
Dividend Income	9,144.
Child's Investment Income - Form 8814	0.
Gross Investment Income - Schedule C	0.
Gross Investment Income - Schedule E	0.
Publicly Traded Partnership Income	0.
Other Net Investment Income - K-1	0.
Other Net Investment Income - K-1 Adjustment	0.
Gross Investment Income Adjustment	0.
Annuity Income - Taxpayer	0.
Annuity Income - Spouse	0.
Total	<u>9,218.</u>

Net Gain from the Disposition of Property Held for Investment (Form 4952, Line 4d)

Capital Gain or Loss from the Disposition of Investment Property	7,381.
Capital Gain Distributions	1,513.
Undistributed L/T Gain from Form 2439	0.
Net Gain or Loss from Contracts and Straddles (Form 6781)	0.
Short-term Capital Loss Carryover	0.
Long-term Capital Loss Carryover	0.
Ordinary Gain or Loss from the Disposition of Investment Property	0.
Net Gain or Loss on Disposition - PTP Partial Dispositions	0.
Net Gain or Loss Adjustment	0.
Total Net Gain (cannot be negative)	<u>8,894.</u>

**Form 8960, Line 13
Modified Adjusted Gross Income Worksheet**

1. Enter your Adjusted Gross Income.....	\$ 370,352.
2a. Foreign Earned Income Exclusion (Form 2555, line 42).....	0.
2b. Deductions reported on Form 2555, line 44 allocable to your Foreign Earned Income Exclusion.....	0.
3. Adjustments for certain CFCs and certain PFICs.....	0.
3a. Adjustment from Form 1041, K-1, Code H (if positive amount).....	0.
4. Sum of lines 1, 2a, 2b, 3, and 3a.....	<u>\$ 370,352.</u>

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

Missing Fidelity 1099-Q for acct [REDACTED] and the 1098-T for the dependents...property taxes were not paid until early 2023.

2022

Client WEISS

2023 Federal Estimated Tax Worksheet

Page 1

2023 Estimated Tax Worksheet

and Daliah Handel Weiss

Keep for Your Records

1	Adjusted gross income you expect in 2023 (see instructions).....	1	370,352.
2a	Deductions.....	2a	27,700.
	- If you plan to itemize deductions, enter the estimated total of your itemized deductions. - If you don't plan to itemize deductions, enter your standard deduction.		
b	If you can take the qualified business income deduction, enter the estimated amount of the deduction.....	2b	47.
c	Add lines 2a and 2b.....	2c	27,747.
3	Subtract line 2c from line 1.....	3	342,605.
4	Tax. Figure your tax on the amount on line 3 by using the 2023 Tax Rate Schedules . Caution: If you will have qualified dividends or a net capital gain, or expect to exclude or deduct foreign earned income or housing, see Worksheets 2-5 and 2-6 in Pub. 505 to figure the tax.....	4	67,514.
5	Alternative minimum tax from Form 6251	5	
6	Add lines 4 and 5. Add to this amount any other taxes you expect to include in the total on Form 1040 or 1040-SR, line 16.....	6	68,514.
7	Credits (see instructions). Do not include any income tax withholding on this line.....	7	1,420.
8	Subtract line 7 from line 6. If zero or less, enter -0-.....	8	67,094.
9	Self-employment tax (see instructions).....	9	
10	Other taxes (see instructions).....	10	1,706.
11a	Add lines 8 through 10.....	11a	68,800.
b	Earned income credit, additional child tax credit, fuel tax credit, net premium tax credit, refundable American opportunity credit, and section 1341 credit.....	11b	
c	Total 2023 estimated tax. Subtract line 11b from line 11a. If zero or less, enter -0-.....	11c	68,800.
12a	Multiply line 11c by 90% (66-2/3% for farmers and fishermen).....	12a	61,920.
b	Required annual payment based on prior year's tax (see instructions).....	12b	77,113.
c	Required annual payment to avoid a penalty. Enter the smaller of line 12a or 12b..... Caution: Generally, if you do not prepay (through income tax withholding and estimated tax payments) at least the amount on line 12c, you may owe a penalty for not paying enough estimated tax. To avoid a penalty, make sure your estimate on line 11c is as accurate as possible. Even if you pay the required annual payment, you may still owe tax when you file your return. If you prefer, you can pay the amount shown on line 11c. For details, see chapter 2 of Pub. 505.	12c	100/110% of 2022 Tax elected 77,113.
13	Income tax withheld and estimated to be withheld during 2023 (including income tax withholding on pensions, annuities, certain deferred income, etc.).....	13	64,381.
14a	Subtract line 13 from line 12c.....	14a	12,732.
	Is the result zero or less? ☐ Yes. Stop here. You are not required to make estimated tax payments. ☒ No. Go to line 14b.		
b	Subtract line 13 from line 11c.....	14b	4,419.
	Is the result less than \$1,000? ☐ Yes. Stop here. You are not required to make estimated tax payments. ☒ No. Go to line 15 to figure your required payment.		
15	Rounded balance.....	15	12,760.
16	Overpayment of estimated tax applied to next tax year.....	16	
17	Total of estimated tax payments to be mailed with vouchers.....	17	12,760.
18	If the first payment you are required to make is due April 18, 2023, enter 1/4 of line 14a (minus any 2022 overpayment that you are applying to this installment) here, and on your estimated tax payment voucher(s) if you are paying by check or money order.....	18	3,190.

* If applicable.

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

2023 Estimated Tax Worksheet - Adjusted Gross Income

<u>Income</u>	<u>This Year</u>	<u>Difference</u>	<u>Next Year</u>
Wages	351,929.	0.	351,929.
Interest	74.	0.	74.
Ordinary dividends	9,144.	0.	9,144.
Long-term capital gain (loss)	8,894.	0.	8,894.
Other income	311.	0.	311.
Total income	370,352.	0.	370,352.

<u>Additional Capital Gain Information</u>	<u>This Year</u>	<u>Difference</u>	<u>Next Year</u>
Qualified dividends	7,904.	0.	7,904.

Estimated adjusted gross income 370,352.

Client WEISS [REDACTED] [REDACTED] and Daliah Handel Weiss

2023 Estimated Tax Maximum Capital Gains Rate Tax Computation
(line numbers are from Schedule D Tax Worksheet)

1. Enter your taxable income for next year		342,605.
2. Enter your qualified dividends for next year	7,904.	
3. Form 4952, line 4g amount	0.	
4. Form 4952, line 4e amount	8,894.	
5. Subtract line 4 from line 3 (not less than zero)	0.	
6. Subtract line 5 from line 2 (not less than zero)	7,904.	
7. Enter the smaller of line 15 or 16 of Sch D	8,894.	
8. Enter the smaller of line 3 or line 4	0.	
9. Subtract line 8 from line 7 (not less than zero)	8,894.	
10. Add lines 6 and 9	16,798.	
11. Add lines 18 and 19 of Sch D	0.	
12. Enter the smaller of line 9 or line 11	0.	
13. Subtract line 12 from line 10		16,798.
14. Subtract line 13 from line 1 (not less than zero)		325,807.
15. Enter the tax bracket limit	89,250.	
16. Enter the smaller of line 1 or line 15	89,250.	
17. Enter the smaller of line 14 or line 16	89,250.	
18. Subtract line 10 from line 1 (not less than zero)	325,807.	
19. Enter the smaller of line 1 or threshold	342,605.	
20. Enter the smaller of line 14 or line 19	325,807.	
21. Enter the larger of line 18 or line 20	325,807.	
22. Subtract line 17 from line 16. This is taxed at 0%	0.	
23. Enter the smaller of line 1 or line 13	16,798.	
24. Enter the amount from line 22	0.	
25. Subtract line 24 from line 23 (not less than zero)	16,798.	
26. Enter the high income threshold	553,850.	
27. Enter the smaller of line 1 or line 26	342,605.	
28. Add lines 21 and 22	325,807.	
29. Subtract lines 28 from line 27 (not less than zero)	16,798.	
30. Enter the smaller of line 25 or line 29	16,798.	
31. Multiply line 30 by 15% (.15)		2,520.
32. Add lines 24 and 30	16,798.	
33. Subtract line 32 from line 23	0.	
34. Multiply line 33 by 20% (.20)		0.
44. Figure the tax on the amount on line 21		64,994.
45. Add lines 31, 34, 40, 43, and 44		67,514.
46. Figure the tax on the amount on line 1		69,025.
47. Tax (enter the smaller of line 45 or line 46)		<u>67,514.</u>

2023 Estimated Tax Worksheet - Alternative Minimum TaxAlternative Minimum Taxable Income

1. Enter amount from 1040ES Worksheet line 3 (if not itemizing, enter ES worksheet line 1 and go to line 3 below)	370,305.
3. Tax refund	0.
4. Dispositions, small bus. stock, and incentive stock options adj.	0.
5. Other adjustments	0.
6. Alternative minimum taxable income	<u><u>370,305.</u></u>

Client WEISS [REDACTED] and Daliah Handel Weiss

2023 Estimated Tax Worksheet - Alternative Minimum Tax (continued)Alternative Minimum Tax

7. Exemption	126,500.
8. Subtract line 7 from line 6	243,805.
9. Tax	61,668.
10. Alternative minimum tax foreign tax credit	212.
11. Tentative minimum tax	61,456.
12. Tax from ES Worksheet	68,094.
13. Alternative minimum tax (line 11 minus line 12)	<u>0.</u>

Tax Computation Using Maximum Capital Gain Rates

14. Alternative minimum taxable income less exemption	243,805.
15. AMT long-term cap. gain, section 1250, and qualified dividends	16,798.
16. Income subject to 26%/28% AMT rates (line 14 minus line 15)	227,007.
17. Tax on 26% rate income (28% and subtract \$4414 if high income)	59,148.
18. Capital gain income subject to 0% rate	0.
19. Tax on 0% capital gain income	0.
20. Capital gain income subject to 15% rate	16,798.
21. Tax on 15% capital gain income	2,520.
22. Capital gain income subject to 20% rate	0.
23. Tax on 20% capital gain income	0.
24. Capital gain income subject to 25% rate	0.
25. Tax on 25% capital gain income	0.
26. Add lines 17, 19, 21, 23, and 25	61,668.
27. Multiply line 14 by 26% (28% and subtract \$4414 if high income)	63,851.
28. Total Tax (smaller of line 26 or line 27)	<u>61,668.</u>

2023 Estimated Tax Worksheet - Nonrefundable Credits

Foreign tax credit	\$ 420.
Child tax credit and credit for other dependents	1,000.
Total	<u>\$ 1,420.</u>

Client WEISS and Daliah Handel Weiss

2023 Estimated Tax - Other Taxes WorksheetAdditional Medicare Tax on Wages and SE Income

1. Wages & tips subject to medicare tax	363,143.
2. Threshold for filing status	250,000.
3. Wages and tips subject to additional medicare tax (subtract line 2 from line 1)	113,143.
4. Additional medicare tax on wages (line 3 x .9%)	1,018.
5. SE medicare income	0.
6. Threshold for filing status	250,000.
7. Amount from line 1	363,143.
8. Remaining threshold (subtract line 7 from line 6)	0.
9. SE income subject to additional medicare tax (subtract line 8 from line 5)	0.
10. Additional medicare tax on SE income (line 9 x .9%)	0.
11. Additional medicare tax on RRTA compensation	0.
12. Total additional medicare tax (add lines 4, 10, and 11)	1,018.

Net Investment Income Tax

1. Interest	74.
2. Dividends	9,144.
3. Annuities from nonqualified plans	0.
4a. Rents, royalties, K-1, Sch C	0.
4b. Rents, royalties, K-1, Sch C not subject to NIIT	0.
4c. Rents, royalties, K-1, Sch C subject to NIIT	0.
5a. Net gain (loss) from dispositions	8,894.
5b. Net gain (loss) from dispositions not subj. to NIIT	0.
5c. Adjustment from disposition of pass-through	0.
5d. Net disposition gain (loss) subject to NIIT	8,894.
6. Adjustment for certain CFCs and PFICs	0.
7. Other modifications to investment income	0.
8. Total investment income	18,112.
9. Total deductions and modifications	0.
10. Net investment income	18,112.
11. Modified adjusted gross income	370,352.
12. Threshold for filing status	250,000.
13. MAGI in excess of threshold	120,352.
14. Lesser of MAGI over excess or net investment income	18,112.
15. Net investment income tax (3.8% rate)	688.

Other Taxes

Additional medicare tax on wages	1,018.
Net investment income tax	688.
Total \$	<u>1,706.</u>

a Employee's social security number [REDACTED]		Payroll organization code 22-20-15-00-110		Intradepartment number 0000000067	
b Employer identification number 59-6001874		1 Wages, tips, other compensation 157,669.10		2 Federal income tax withheld 20,223.24	
c Employer's name, address, and ZIP code State of Florida Jimmy Patronis, Chief Financial Officer 200 E Gaines Street Tallahassee, Florida 32399-0356		3 Social security wages 147,000.00		4 Social security tax withheld 9,114.00	
		5 Medicare wages and tips 168,882.62		6 Medicare tax withheld 2,448.80	
		7 Social security tips		10 Dependent care benefits	
d Control number 016663 01/06		11 Nonqualified plans		12a See instructions for box 12 G 6,000.00	
e Employee's first name, mi, and last name DALIAH H WEISS [REDACTED]		13 Statutory employee Retirement plan Third-Party sick pay ☐ ☒ ☐		12b DD 22,609.44	
		14 Other 125 4,901.92		12c	
				12d	
				12e	
f Employee's address and ZIP code		15 State Employer's state ID number		16 State wages, tips, etc.	
		17 State income tax		18 Local wages, tips, etc.	
		19 Local income tax		20 Locality name	

FORM W-2 WAGE AND TAX STATEMENT 2022

OMB No. 1545-0048
Department of the Treasury - Internal Revenue Service

Copy B - To Be Filed With Employee's FEDERAL Tax Return
This information is being furnished to the Internal Revenue Service

a Employee's social security number [REDACTED]		Payroll organization code 22-20-15-00-110		Intradepartment number 0000000067	
b Employer identification number [REDACTED]		1 Wages, tips, other compensation 157,669.10		2 Federal income tax withheld 20,223.24	
c Employer's name, address, and ZIP code State of Florida Jimmy Patronis, Chief Financial Officer 200 E Gaines Street Tallahassee, Florida 32399-0356		3 Social security wages 147,000.00		4 Social security tax withheld 9,114.00	
		5 Medicare wages and tips 168,882.62		6 Medicare tax withheld 2,448.80	
		7 Social security tips		10 Dependent care benefits	
d Control number 016663 01/06		11 Nonqualified plans		12a See instructions for box 12 G 6,000.00	
e Employee's first name, mi, and last name DALIAH H WEISS [REDACTED]		13 Statutory employee Retirement plan Third-Party sick pay ☐ ☒ ☐		12b DD 22,609.44	
		14 Other 125 4,901.92		12c	
				12d	
				12e	
f Employee's address and ZIP code		15 State Employer's state ID number		16 State wages, tips, etc.	
		17 State income tax		18 Local wages, tips, etc.	
		19 Local income tax		20 Locality name	

FORM W-2 WAGE AND TAX STATEMENT 2022

OMB No. 1545-0048
Department of the Treasury - Internal Revenue Service

Copy C - For EMPLOYEE'S RECORDS
AA227W Rev. 08/12/2022

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

Void ☐		a Employee's social security number		Copy D -- For Employer OMB No. 1545 0008	
b Employer identification number (EIN)		1 Wages, tips, other compensation		2 Federal income tax withheld	
		194260.00		44158.00	
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld	
		147000.00		9114.00	
		5 Medicare wages and tips		6 Medicare tax withheld	
		194260.00		2816.77	
d		7 Social security tips		8 Allocated tips	
		9		10 Dependent care benefits	
a Employee's name, address, and ZIP code		11 Nonqualified plans		12a See instructions for box 12	
WEISS		13 Statutory employee Retirement plan Third party sick pay		12b	
		☐ ☐ ☐		12c	
		14 Other		12d	
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax	
				18 Local wages, tips, etc.	
				19 Local income tax	
				20 Locality name	

Form **W-2** Wage and Tax
Statement
Copy D -- For Employer

REV 01/17/23 QBDT

2022

Department of the Treasury--Internal Revenue Service
For Privacy Act and Paperwork Reduction
Act Notice, see separate instructions.