

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/01/2023

General Information

Name: Mr Richard M Surrency Sr

Address: 6003 E 4th Mnr, Palatka, FL 32177

PID 266994

County: Putnam

AGENCY INFORMATION

Organization	Suborganization	Title
Putnam County School Board	Elected Constitutional Officer	Superintendent

Net Worth

My Net Worth as of December 31, 2022 was \$ 644,500.00.

Assets

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

The aggregate value of my household goods and personal effect is \$ 15,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Primary Home	\$ 425,000.00
Vehicles Owned (3)	\$ 85,000.00
SEI Investment Account	\$ 4,000.00
Franklin-Templeton Investment Account	\$ 4,500.00
Ohio National Investment Account	\$ 340,000.00
TD Bank Checking Account	\$ 18,000.00
TD Bank Savings Account	\$ 22,000.00
Hyatt Condo Account	\$ 4,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Vystar Credit Union	PO Box 45085, Jacksonville, FL. 32232	\$ 215,000.00
Yamaha Financial Services	3065 Chastain Meadows Parkway, Bldg. 100, Marietta, GA. 30066	\$ 38,000.00
Wells Fargo Credit Cards	420 Montgomery Street, San Francisco, CA. 94104	\$ 6,000.00

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

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

N/A

Training

- ☒ I certify that I have completed the required training under Section 112.3142, F.S.
- ☐ Required training under Section 112.3142, F.S., not applicable to filer 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.

Richard M Surrency Sr

Digitally signed: 06/01/2023

Filed with COE: 06/01/2023

Form 1040		Department of the Treasury—Internal Revenue Service		2022		OMB No. 1545-0074		IRS Use Only – Do not write or staple in this space.	
Filing Status		☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying 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		Last name				Your social security number			
Richard M		Surrency, Sr				[REDACTED]			
If joint return, spouse's first name and middle initial		Last name				Spouse's social security number			
Penny L		Surrency				[REDACTED]			
Home address (number and street). If you have a P.O. box, see instructions.						Apt. no.		Presidential Election Campaign	
6003 4th Manor East								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.	
City, town, or post office. If you have a foreign address, also complete spaces below.						State		ZIP code	
Palatka						FL		32177	
Foreign country name				Foreign province/state/county		Foreign postal code		☐ You ☐ Spouse	
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):		(1) First name		(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 . . . ☐		Last name						Child tax credit	
								☐	
								☐	
								☐	
								☐	
								☐	
Income		1a Total amount from Form(s) W-2, box 1 (see instructions)						1a 217,642.	
Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.		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 217,642.	
Attach Sch. B if required.		2a Tax-exempt interest		2a 236.		b Taxable interest		2b 23.	
		3a Qualified dividends		3a 169.		b Ordinary dividends		3b 213.	
		4a IRA distributions		4a 28,552.		b Taxable amount		4b 28,552.	
Standard Deduction for -		5a Pensions and annuities		5a		b Taxable amount		5b 62,379.	
• Single or Married filing separately, \$12,950		6a Social security benefits		6a		b Taxable amount		6b	
• Married filing jointly or Qualifying surviving spouse, \$25,900		c If you elect to use the lump-sum election method, check here (see instructions). ☐							
• Head of household, \$19,400		7 Capital gain or (loss). Attach Schedule D if required. If not required, check here. ☐						7 402.	
• If you checked any box under Standard Deduction, see instructions.		8 Other income from Schedule 1, line 10						8	
		9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income						9 309,211.	
		10 Adjustments to income from Schedule 1, line 26						10 300.	
		11 Subtract line 10 from line 9. This is your adjusted gross income						11 308,911.	
		12 Standard deduction or itemized deductions (from Schedule A)						12 27,300.	
		13 Qualified business income deduction from Form 8995 or Form 8995-A						13	
		14 Add lines 12 and 13						14 27,300.	
		15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income						15 281,611.	

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

Form 1040 (2022)

UYA

Tax and Credits	16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐ _____	16	55,207.
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	55,207.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	19,779.
	21	Add lines 19 and 20	21	19,779.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	35,428.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	24.
	24	Add lines 22 and 23. This is your total tax	24	35,452.

Payments	25	Federal income tax withheld from:			25d	49,792.
	a	Form(s) W-2	25a	37,126.		
	b	Form(s) 1099	25b	12,666.		
	c	Other forms (see instructions)	25c			
	d	Add lines 25a through 25c				
	26	2022 estimated tax payments and amount applied from 2021 return			26	
	27	Earned income credit (EIC) NO	27			
	28	Additional child tax credit from Schedule 8812	28			
	29	American opportunity credit from Form 8863, line 8	29			
	30	Reserved for future use	30			
	31	Amount from Schedule 3, line 15	31			
	32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32	0.		
33	Add lines 25d, 26, and 32. These are your total payments	33	49,792.			

Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	14,340.
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐	35a	14,340.
	b	Routing number _____	c	Type: ☒ Checking ☐ Savings
	d	Account number _____		
36	Amount of line 34 you want applied to your 2023 estimated tax	36		

Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions.	37	0.
	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		
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Designee's name	Rhonda D Odom	Phone no.	386-972-1832	Personal identification number (PIN)	
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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.			
	Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
	Superintendent			
	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.)
	Teacher			
Phone no.	(386) 937-5136			
Email address				

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
	Rhonda D Odom	Rhonda D Odom	03/08/2023	P01388459	
	Firm's name	Rhonda D. Odom, CPA			Phone no. (386) 972-1832
	Firm's address	P.O. Box 1594, Palatka, FL, 32178-1594			Firm's EIN

Go to www.irs.gov/Form1040 for instructions and the latest information.Form **1040** (2022)

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SCHEDULE 1
(Form 1040)

Additional Income and Adjustments to Income

OMB No. 1545-0074

2022

Attachment
Sequence No. **01**

Department of the Treasury
Internal Revenue Service

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

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

Your social security number

Richard M Surrency, Sr and Penny L Surrency

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:	8z	
9	Total other income. Add lines 8a through 8z	9	
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	0.

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

Schedule 1 (Form 1040) 2022

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Part II Adjustments to Income

11	Educator expenses	11	300.
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 8i 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	300.

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

Richard M Surrency, Sr and Penny L Surrency

Your social security number

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE.	4	
5	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	
12	Net investment income tax. Attach Form 8960	12	24.
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares.	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2022

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Part II Other Taxes (continued)

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

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

Your social security number

Richard M Surrency, Sr and Penny L Surrency

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	11.
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	19,768.
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	19,779.

(continued on page 2)

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

Schedule 3 (Form 1040) 2022

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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.

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Schedule 3 (Form 1040) 2022

Do Not File

Client Copy

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

Richard M Surrency, Sr and Penny L Surrency

Your social security number

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

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	278.	317.	39.	
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7 0.

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	1.	1.		
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 instructions				13 402.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2				15 402.

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

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03/08/2023 08:13:37 PM

Schedule D (Form 1040) 2022

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	402 .
● 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	0 .
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: ● The loss on line 16; or ● (\$3,000), or if married filing separately, (\$1,500) } Note: When figuring which amount is smaller, treat both amounts as positive numbers.	21	()
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.		

UYA

Schedule D (Form 1040) 2022

Sales and Other Dispositions of Capital Assets

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

Name(s) shown on return

Social security number or taxpayer identification number

Richard M Surrency, Sr and Penny L Surrency

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

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

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

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

- ☒ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
☐ **(C)** Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	0.62 sh SEI Tax Managed Large Cap F	Various	11/02/2022	19.	23.	W	4.	
	7.414 sh SEI Tax Managed Large Cap F	Various	11/21/2022	259.	294.	W	35.	
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked).				278.	317.		39.	

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

Health Savings Accounts (HSAs)

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

Go to www.irs.gov/Form8889 for instructions and the latest information.

OMB No. 1545-0074

2022
Attachment
Sequence No. **52**

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

Richard M Surrency, Sr

Social security number of HSA beneficiary.
If both spouses have HSAs, see instructions.

Before you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required.

Part I HSA Contributions and Deduction. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse.

1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2022. See instructions	☒ Self-only ☐ Family
2	HSA contributions you made for 2022 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2022. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions.	2
3	If you were under age 55 at the end of 2022 and, on the first day of every month during 2022, you were, or were considered, an eligible individual with the same coverage, enter \$3,650 (\$7,300 for family coverage). All others , see the instructions for the amount to enter.	3 4,650.
4	Enter the amount you and your employer contributed to your Archer MSAs for 2022 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2022, also include any amount contributed to your spouse's Archer MSAs.	4
5	Subtract line 4 from line 3. If zero or less, enter -0-	5 4,650.
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2022, see the instructions for the amount to enter.	6 4,650.
7	If you were age 55 or older at the end of 2022, married, and you or your spouse had family coverage under an HDHP at any time during 2022, enter your additional contribution amount. See instructions	7
8	Add lines 6 and 7.	8 4,650.
9	Employer contributions made to your HSAs for 2022	9 3,000.
10	Qualified HSA funding distributions.	10
11	Add lines 9 and 10.	11 3,000.
12	Subtract line 11 from line 8. If zero or less, enter -0-	12 1,650.
13	HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13	13

Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.

Part II HSA Distributions. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part II for each spouse.

14a	Total distributions you received in 2022 from all HSAs (see instructions)	14a 3,560.
b	Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions	14b
c	Subtract line 14b from line 14a	14c 3,560.
15	Qualified medical expenses paid using HSA distributions (see instructions).	15 3,560.
16	Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f	16
17a	If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here ☐	
b	Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c.	17b

Part III Income and Additional Tax for Failure To Maintain HDHP Coverage. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse.

18	Last-month rule	18
19	Qualified HSA funding distribution	19
20	Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f	20
21	Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d.	21

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

Form **8889** (2022)

UYA

Health Savings Accounts (HSAs)

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

Go to www.irs.gov/Form8889 for instructions and the latest information.

OMB No. 1545-0074

2022

Attachment
Sequence No. **52**

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

Penny L Surrency

Social security number of HSA beneficiary.
If both spouses have HSAs, see instructions.

Before you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required.

Part I HSA Contributions and Deduction. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse.

1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2022. See instructions	☒ Self-only ☐ Family
2	HSA contributions you made for 2022 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2022. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions.	2
3	If you were under age 55 at the end of 2022 and, on the first day of every month during 2022, you were, or were considered, an eligible individual with the same coverage, enter \$3,650 (\$7,300 for family coverage). All others , see the instructions for the amount to enter.	3 4,650.
4	Enter the amount you and your employer contributed to your Archer MSAs for 2022 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2022, also include any amount contributed to your spouse's Archer MSAs.	4
5	Subtract line 4 from line 3. If zero or less, enter -0-	5 4,650.
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2022, see the instructions for the amount to enter.	6 4,650.
7	If you were age 55 or older at the end of 2022, married, and you or your spouse had family coverage under an HDHP at any time during 2022, enter your additional contribution amount. See instructions	7
8	Add lines 6 and 7.	8 4,650.
9	Employer contributions made to your HSAs for 2022	9 2,000.
10	Qualified HSA funding distributions.	10
11	Add lines 9 and 10.	11 2,000.
12	Subtract line 11 from line 8. If zero or less, enter -0-	12 2,650.
13	HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13	13

Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.

Part II HSA Distributions. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part II for each spouse.

14a	Total distributions you received in 2022 from all HSAs (see instructions)	14a 2,202.
b	Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions.	14b
c	Subtract line 14b from line 14a.	14c 2,202.
15	Qualified medical expenses paid using HSA distributions (see instructions).	15 2,202.
16	Taxable HSA distributions. Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f.	16
17a	If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here ☐	
b	Additional 20% tax (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c.	17b

Part III Income and Additional Tax for Failure To Maintain HDHP Coverage. See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse.

18	Last-month rule	18
19	Qualified HSA funding distribution	19
20	Total income. Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f.	20
21	Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d.	21

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

Form **8889** (2022)

UYA

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

Richard M Surrency, Sr and Penny L Surrency

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	23.
2	Ordinary dividends (see instructions)	2	213.
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	402.
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	402.
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	638.

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	638.
Individuals:			
13	Modified adjusted gross income (see instructions)	13	308,911.
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	58,911.
16	Enter the smaller of line 12 or line 15.	16	638.
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	24.
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	

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

Form 8960 (2022)

UYA

Residential Energy Credits

Go to www.irs.gov/Form5695 for instructions and the latest information.
Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022

Attachment
Sequence No. **158**

Name(s) shown on return

Your social security number

Richard M Surrency, Sr and Penny L Surrency

Part I Residential Clean Energy Credit (See instructions before completing this part.)

Note: Skip lines 1 through 11 if you only have a credit carryforward from 2021.

1	Qualified solar electric property costs	1	65,893.
2	Qualified solar water heating property costs	2	
3	Qualified small wind energy property costs	3	
4	Qualified geothermal heat pump property costs	4	
5	Qualified biomass fuel property costs	5	
6a	Add lines 1 through 5	6a	65,893.
6b	Multiply line 6a by 30% (0.30)	6b	19,768.
7a	Qualified fuel cell property. Was qualified fuel cell property installed on, or in connection with, your main home located in the United States? (See instructions.) Caution: If you checked the "No" box, you cannot take a credit for qualified fuel cell property. Skip lines 7b through 11.	7a	☐ Yes ☐ No
b	Print the complete address of the main home where you installed the fuel cell property.		
	Number and street Unit No.		
	City, State, and ZIP code		
8	Qualified fuel cell property costs	8	
9	Multiply line 8 by 30% (0.30)	9	
10	Kilowatt capacity of property on line 8 above _____ x \$1,000	10	
11	Enter the smaller of line 9 or line 10	11	
12	Credit carryforward from 2021. Enter the amount, if any, from your 2021 Form 5695, line 16	12	
13	Add lines 6b, 11, and 12.	13	19,768.
14	Limitation based on tax liability. Enter the amount from the Residential Clean Energy Credit Limit Worksheet (see instructions)	14	55,196.
15	Residential clean energy credit. Enter the smaller of line 13 or line 14. Also include this amount on Schedule 3 (Form 1040), line 5	15	19,768.
16	Credit carryforward to 2023. If line 15 is less than line 13, subtract line 15 from line 13	16	

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

Form **5695** (2022)

UYA

Part II Energy Efficient Home Improvement Credit (See instructions before completing this part.)

17a Were the qualified energy efficiency improvements or residential energy property costs for your main home located in the United States? (see instructions) Caution: If you checked the "No" box, you cannot claim the energy efficient home improvement credit. Do not complete Part II.	17a ☐ Yes ☐ No
b Print the complete address of the main home where you made the qualifying improvements. Caution: You can only have one main home at a time. Number and street Unit No. City, State, and ZIP code	
c Were any of these improvements related to the construction of this main home? Caution: If you checked the "No" box, you can only claim the energy efficient home improvement credit for qualifying improvements that were not related to the construction of the home. Do not include expenses related to the construction of your main home, even if the improvements were made after you moved into the home.	17c ☐ Yes ☐ No
18 Lifetime limitation. Enter the amount from the Lifetime Limitation Worksheet (see instructions). . . .	18
19 Qualified energy efficiency improvements (original use must begin with you and the component must reasonably be expected to last for at least 5 years; do not include labor costs) (see instructions).	
a Insulation material or system specifically and primarily designed to reduce heat loss or gain of your home that meets the prescriptive criteria established by the 2009 IECC	19a
b Exterior doors that meet or exceed the version 6.0 Energy Star program requirements	19b
c Metal or asphalt roof that meets or exceeds the Energy Star program requirements and has pigmented coatings or cooling granules which are specifically and primarily designed to reduce the heat gain of your home	19c
d Exterior windows and skylights that meet or exceed the version 6.0 Energy Star program requirements	19d
e Maximum amount of cost on which the credit can be figured	19e \$2,000
f If you claimed window expenses on your Form 5695 prior to 2022, enter the amount from the Window Expense Worksheet (see instructions); otherwise enter -0-	19f
g Subtract line 19f from line 19e. If zero or less, enter -0-	19g
h Enter the smaller of line 19d or line 19g	19h
20 Add lines 19a, 19b, 19c, and 19h	20
21 Multiply line 20 by 10% (0.10)	21
22 Residential energy property costs (must be placed in service by you; include labor costs for onsite preparation, assembly, and original installation) (see instructions).	
a Energy-efficient building property. Do not enter more than \$300	22a
b Qualified natural gas, propane, or oil furnace or hot water boiler. Do not enter more than \$150	22b
c Advanced main air circulating fan used in a natural gas, propane, or oil furnace. Do not enter more than \$50	22c
23 Add lines 22a through 22c	23
24 Add lines 21 and 23	24
25 Maximum credit amount. (If you jointly occupied the home, see instructions)	25 500.
26 Enter the amount, if any, from line 18	26
27 Subtract line 26 from line 25. If zero or less, stop ; you cannot take the energy efficient home improvement credit	27
28 Enter the smaller of line 24 or line 27	28
29 Limitation based on tax liability. Enter the amount from the Energy Efficient Home Improvement Credit Limit Worksheet (see instructions)	29
30 Energy efficient home improvement credit. Enter the smaller of line 28 or line 29. Also include this amount on Schedule 3 (Form 1040), line 5	30

UYA

Form 5695 (2022)

Federal Electronic Filing Instructions

Tax Year 2022

You are responsible for confirming the status of your electronically filed return. You can confirm the status of your return by going to <https://www.taxact.com/ef/efile-center>. You will need to enter the primary social security number and last name on the return along with your ZIP code.

You can check the status of your client's returns by clicking the Refresh button in the Professional Reports.

Self Select PIN: Your return has been successfully e-filed once you receive your acceptance from the IRS.

Refund:

You have elected to receive your refund of \$14,340 via direct deposit.

You can start checking the status of your refund within 24 hours of e-filing at the IRS website <https://www.irs.gov/Refunds> under Where's My Refund. The IRS issues most refunds in less than 21 days. Updates to refund status are made once daily - usually at night.

Prior Year Comparison

Richard M Surrency, Sr and Penny L Surrency	2021	2022	Difference
Income			
Wages, salaries, and tips	\$206,989	\$217,642	\$10,653
Taxable interest	\$29	\$23	\$-6
Tax-exempt interest	\$0	\$236	\$236
Ordinary dividends	\$373	\$213	\$-160
IRA distributions	\$0	\$28,552	\$28,552
Pensions and annuities	\$60,615	\$62,379	\$1,764
Social Security benefits	\$0	\$0	\$0
Capital gain or loss	\$1,065	\$402	\$-663
Taxable state tax refunds	\$0	\$0	\$0
Alimony received	\$0	\$0	\$0
Business income or loss	\$3,395	\$0	\$-3,395
Other gains or losses	\$0	\$0	\$0
Rental real estate, royalties, partnership	\$0	\$0	\$0
Farm income or loss	\$0	\$0	\$0
Unemployment compensation	\$0	\$0	\$0
Other income	\$0	\$0	\$0
Total income	\$272,466	\$309,211	\$36,745
Adjustments to income	\$240	\$300	\$60
Adjusted gross income	\$272,226	\$308,911	\$36,685
Standard or itemized deductions	\$25,700	\$27,300	\$1,600

Medical and dental expenses	\$0	\$0	\$0
Taxes	\$0	\$5,561	\$5,561
Interest	\$0	\$9,030	\$9,030
Gifts to Charity	\$0	\$4,020	\$4,020
Casualty and theft losses	\$0	\$0	\$0
Other deductions	\$0	\$0	\$0
Qualified business income deduction	\$631	\$0	\$-631
Taxable income	\$245,895	\$281,611	\$35,716
Tax	\$46,948	\$55,207	\$8,259
Alternative minimum tax	\$0	\$0	\$0
Excess advance premium tax credit repayment	\$0	\$0	\$0
Income tax	\$46,948	\$55,207	\$8,259
Tax credits			
Child tax credit	\$500	\$0	\$-500
Foreign tax credit	\$10	\$11	\$1
Nonrefundable credit for child and dependent care expenses	\$0	\$0	\$0
Education credits	\$0	\$0	\$0
Retirement savings contributions credit	\$0	\$0	\$0
Residential energy credits	\$0	\$19,768	\$19,768
Other credits	\$0	\$0	\$0
Other taxes	\$536	\$24	\$-512
Total tax	\$46,974	\$35,452	\$-11,522
Payments			
Federal income tax withheld	\$43,669	\$49,792	\$6,123
Estimated tax payments	\$0	\$0	\$0
Earned income credit	\$0	\$0	\$0

Additional child tax credit	\$0	\$0	\$0
Refundable education credit	\$0	\$0	\$0
Recovery rebate credit	\$0	\$0	\$0
Net premium tax credit	\$0	\$0	\$0
Amount paid with request for extension	\$0	\$0	\$0
Excess social security and tier 1 RRTA	\$0	\$0	\$0
Fuel tax credit	\$0	\$0	\$0
Refundable credit for child and dependent care expenses	\$0	\$0	\$0
Other payments	\$0	\$0	\$0
Total payments	\$43,669	\$49,792	\$6,123
Estimated tax penalty	\$0	\$0	\$0
Balance due	\$3,305	\$0	\$-3,305
Refund	\$0	\$14,340	\$14,340
Effective Tax Rate	19.100000%	12.590000%	-6.510000%

2022 FEDERAL, STATE AND LOCAL WITHHOLDING SUMMARY

Richard M Surrency, Sr and Penny L Surrency

FORM W-2 - WAGES SUMMARY

T = Taxpayer S = Spouse

T S	Employer's Name	Box 1 Wages and salaries	Box 2 Federal income tax withheld	Box 17 State income tax withheld	Box 19 Local income tax withheld
T	Putnam County School District	151,652.80	28,200.60		
S	Putnam County School District	65,989.34	8,925.71		
TOTAL (rounded)			37,126.00		

FORM 1099-R - RETIREMENT DISTRIBUTION SUMMARY

T = Taxpayer S = Spouse

T S	Payer's Name	Box 1 Gross distributions	Box 4 Federal income tax withheld	Box 12 State income tax withheld	Box 15 Local income tax withheld
T	State of Florida Dept of Mgmt	62,379.18	8,382.96		
T	American General Life Services	28,552.48	4,282.87		
TOTAL (rounded)			12,666.00		

OTHER WITHHOLDINGS

	Federal income tax withheld	State income tax withheld	Local income tax withheld
Form 1099-G - Unemployment Compensation			
Form W-2G - Certain Gambling Winnings			
Form 1099-MISC - Miscellaneous Income			
Form 1099-NEC - Nonemployee Compensation			
Form SSA-1099 / RRB-1099 - Social Security Benefits			
Form(s) 1099-INT - Interest Income			
Form(s) 1099-DIV - Dividend Income			
Form(s) 1099-OID - Original Issue Discount			
Form 1099-B / Capital Gain Transaction Worksheet			
Form 1099-K - Payment Card and 3rd Party Network Trans.			
Schedule K-1 - Partnership, S Corporation, and Estate/Trust			
Form RRB-1099-R - Railroad Retirement Benefits			
Form W-2GU / W-2AS / W-2VI / W-2CM Wages			
Other Withholdings			