

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/08/2023

General Information

Name: Hon Lawrence Vincent Johnston III

CONFIDENTIAL

Address: {REDACTED}

PID 47959

County: {REDACTED}

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Senior Judges	Consent to be Assigned	Senior / Retired Judge

Net Worth

My Net Worth as of December 31, 2022 was \$ 3,724,279.00.

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 \$ 600,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Mortgages	\$ 430,300.00
Stocks, Bonds, Def Comp	\$ 2,082,609.00
Cash	\$ 611,370.00
Home and Vehicles	\$ 600,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

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

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

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.

Lawrence Vincent Johnston III

Digitally signed: 06/08/2023

Filed with COE: 06/08/2023

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

Lawrence V Johnston

Your social security number

If joint return, spouse's first name and middle initial

Last name

Johnston

Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions.

Apt. no.

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

State

ZIP code

Foreign country name

Foreign province/state/county

Foreign postal code

Presidential Election Campaign

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

☐ You☐ Spouse**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

Last name

(2) Social security number

(3) Relationship to you

(4) Check the box if qualifies for (see instr.):
Child tax credit | Credit for other dependentsIf more than four dependents, see instructions and check here ☐**Income****1a** Total amount from Form(s) W-2, box 1 (see instructions)**1a**

48,704.

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

If you did not get a Form W-2, see instructions.

b Household employee wages not reported on Form(s) W-2**1b****c** Tip income not reported on line 1a (see instructions)**1c****d** Medicaid waiver payments not reported on Form(s) W-2 (see instructions)**1d****e** Taxable dependent care benefits from Form 2441, line 26**1e****f** Employer-provided adoption benefits from Form 8839, line 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**

48,704.

Attach Schedule B if required.

2a Tax-exempt interest**2a****b** Taxable interest**2b**

32,343.

3a Qualified dividends**3a**

1,188.

b Ordinary dividends**3b**

2,389.

4a IRA distributions**4a****b** Taxable amount**4b**

898.

5a Pensions and annuities**5a**

199,636.

b Taxable amount**5b**

81,869.

6a Social security benefits**6a**

31,392.

b Taxable amount**6b**

26,683.

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**

160.

	8	Other income from Schedule 1, line 10	8	8,443.
	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9	201,489.
	10	Adjustments to income from Schedule 1, line 26	10	9,000.
Standard Deduction See <i>Standard Deduction Chart</i> on the last page of this form.	11	Subtract line 10 from line 9. This is your adjusted gross income	11	192,489.
	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	1,689.
	14	Add lines 12 and 13	14	28,989.
	15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15	163,500.
Tax and Credits	16	Tax (see instructions). Check if any from: 1 ☐ Form(s) 8814 2 ☐ Form(s) 4972 3 ☐	16	27,109.
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	27,109.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	
	21	Add lines 19 and 20	21	0.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	27,109.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	
	24	Add lines 22 and 23. This is your total tax	24	27,109.
	Payments	25	Federal income tax withheld from:	
a		Form(s) W-2	25a	7,555.
b		Form(s) 1099	25b	11,922.
c		Other forms (see instructions)	25c	
d		Add lines 25a through 25c	25d	19,477.
26		2022 estimated tax payments and amount applied from 2021 return	26	12,628.
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	32,105.

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

Form 1040-SR (2022)

Refund**34** If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**.**34** 4,996.**35a** Amount of line 34 you want **refunded to you**. If Form 8888 is attached, check here. ☐**35a** 0.Direct deposit?
See
instructions.**b** Routing number**c** Type: ☐ Checking ☐ Savings**d** Account number**36** Amount of line 34 you want **applied to your 2023 estimated tax****36** 4,996.**Amount
You Owe****37** Subtract line 33 from line 24. This is the **amount you owe**.
For details on how to pay, go to www.irs.gov/Payments or see instructions.**37****38** Estimated tax penalty (see instructions)**38****Third Party
Designee**

Do you want to allow another person to discuss this return with the IRS?

See instructions.

☒ **Yes. Complete below.**☐ **No**Designee's
name

Phyllis D. Smith, CPA

Phone
no.

772-589-2939

Personal identification
number (PIN)

[REDACTED]

**Sign
Here**

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

Your signature

Date

Your occupation

If the IRS sent you an Identity
Protection PIN, enter it here
(see inst.)

Retired Judge

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

[REDACTED]

Email address

Preparer's name

Preparer's signature

Date

PTIN

Check if:

Phyllis D. Smith, CPA

Phyllis D. Smith, CPA

3/07/23

P00767232

☐ Self-employed

Firm's name Phyllis D. Smith, CPA, P.A.

Phone no. 772-589-2939

Firm's address 1623 US Highway 1

Firm's EIN 592508305

Sebastian, FL 32958

**Paid
Preparer
Use Only**Go to www.irs.gov/Form1040SR for instructions and the latest information.

Form 1040-SR (2022)

Standard Deduction Chart*Add the number of boxes checked in the "Age/Blindness" section of *Standard Deduction* on page 1. 1

IF your filing status is. . .	AND the number of boxes checked is. . .	THEN your standard deduction is. . .
Single	1	\$ 14,700
	2	16,450
Married filing jointly	1	\$ 27,300
	2	28,700
	3	30,100
	4	31,500
Qualifying surviving spouse	1	\$ 27,300
	2	28,700
Head of household	1	\$ 21,150
	2	22,900
Married filing separately**	1	\$ 14,350
	2	15,750
	3	17,150
	4	18,550

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

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

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

Form 1040-SR (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

Lawrence V and [REDACTED] Johnston

Your social security number

[REDACTED]

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions):		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	8,443.
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	8,443.

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	DB	16	9,000.
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	9,000.

Schedule 1 (Form 1040) 2022

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

Lawrence V and [REDACTED] Johnston

Your social security number

[REDACTED]

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

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

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

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

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

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	40,624.	49,039.	1,796.	-6,619.
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 -6,619.

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

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

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

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
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 6,779.
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 6,779.

Part III Summary

16 Combine lines 7 and 15 and enter the result.	16	160.
• 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

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.

2022

Attachment
Sequence No. 12A

Name(s) shown on return

SSN or taxpayer identification number

Lawrence V and [REDACTED] Johnston

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 shares XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	SPDR Ser TR	Various	1/24/22	40,624.	49,039.	W	1,796.	-6,619.
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)				40,624.	49,039.	1,796.	-6,619.

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.

Lawrence V and [REDACTED] Johnston

Forms needed for this returnFederal: 1040-SR, Sch 1, 1040-ES, Sch B, Sch D, Sch E p2, 7203*, 8879, 8949
8995

* Indicates a form that will be auto-attached

Tax Rates

	<u>Marginal</u>	<u>Effective</u>
Federal	22.0%	16.6%

Carryovers to 2023

None

Estimates**Federal Estimates**

	<u>Estimate</u>	<u>Overpayment</u>	<u>Balance</u>
4/18/23	2,586.	2,586.	0.
6/15/23	2,586.	2,410.	176.
9/15/23	2,586.	0.	2,586.
1/16/24	2,586.	0.	2,586.
Total	\$ 10,344.	\$ 4,996.	\$ 5,348.

Lawrence V and [REDACTED] Johnston

Wage Schedule

Taxpayer - Employer	Wages	Federal W/H	FICA	Medi-care	State W/H	Local W/H
STATE OF FLORIDA	12,000.	1,201.		174.		
Florida Institute of Technology	704.		570.	133.		
Total	12,704.	1,201.	570.	307.	0.	0.
Spouse - Employer	Wages	Federal W/H	FICA	Medi-care	State W/H	Local W/H
[REDACTED]	[REDACTED]				0.	0.
Grand Total	[REDACTED]				0.	0.

Pension and Annuities Schedule

Taxpayer - Payer	Total Received	Taxable Amount	Federal W/H	State W/H
Nationwide Retirement Solutions Inc	16,996.	16,996.	5,949.	
John Hancock Life	352.			
Florida Retirement System	64,963.	64,873.	5,973.	
Symetra Life Ins Co	117,325.			
Grand Total	199,636.	81,869.	11,922.	0.

IRA Distribution Schedule

Taxpayer - Payer	Total Received	Taxable Amount	Federal W/H	State W/H
Wells Fargo Clearing Services	898.	898.		
Grand Total	898.	898.	0.	0.

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

National Financial Services LLC	Total	1,188.
		1,188.

Schedule D, Line 13
Capital Gain Distributions

Pershing LLC	Total	6,779.
		6,779.

Lawrence V and [REDACTED] Johnston

Social Security Benefits Worksheet (Form 1040 or 1040-SR, Lines 6a and 6b)

1. Social security benefits (SSA-1099, box 5)	31,392.
2. Enter one-half of line 1	15,696.
3. Combine amounts from Form 1040 or 1040-SR, lines 1z, 2b, 3b, 4b, 5b 7, and 8 (add back excludable interest from Form 8815)	174,806.
4. Enter the amount from Form 1040 or 1040-SR, line 2a	0.
5. Enter the total of any exclusions/adjustments	0.
6. Combine lines 2, 3, 4 and 5	190,502.
7. Enter the amounts from Form Schedule 1, lines 11 through 20, and 23 and 25	9,000.
8. Subtract line 7 from line 6 (not less than 0)	181,502.
9. Threshold for your filing status	32,000.
10. Subtract line 9 from line 8 (not less than 0)	149,502.
11. Additional threshold for your filing status	12,000.
12. Subtract line 11 from line 10 (not less than 0)	137,502.
13. Enter the smaller of line 10 or line 11	12,000.
14. Enter one-half of line 13	6,000.
15. Enter the smaller of line 2 or line 14	6,000.
16. Multiply line 12 by 85% (.85)	116,877.
17. Add lines 15 and 16	122,877.
18. Multiply line 1 by 85% (.85)	26,683.
19. Taxable social security benefits (the smaller of line 17 or line 18)	<u>26,683.</u>

Qualified Business Income

Trade or business name:

Taxpayer identification number:

Business income.....

Qualified Business Income

Lawrence V and [REDACTED] Johnston

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	163,500.
2. Enter amount from Form 1040, 1040-SR, or 1040-NR, line 3a	1,188.
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	160.
4. Add lines 2 and 3	1,348.
5. Subtract line 4 from line 1. If 0 or less, enter 0.	162,152.
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	1,348.
11. Enter the amount from line 9	0.
12. Subtract line 11 from line 10	1,348.
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	163,500.
15. Add lines 5 and 9	162,152.
16. Subtract line 15 from line 14. If 0 or less, enter 0.	1,348.
17. Enter the smaller of line 12 or line 16	1,348.
18. Multiply line 17 by 15% (.15)	202.
19. Add lines 9 and 17	1,348.
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)	26,907.
23. Add lines 18, 21, and 22	27,109.
24. Figure the tax on the amount on line 1. (Use the Tax Table or Tax Computation Worksheet)	27,204.
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>27,109.</u>

Federal Income Tax Withheld

[REDACTED]

Nationwide Retirement Solutions In
Florida Retirement System

[REDACTED]

5,949.
5,973.
Total