

2022 Form 6X - Amendment to Full and Public Disclosure of Financial Interests

Filed with COE: 06/29/2023

General Information

Name: Hon Stephanie Rebecca Silver **CONFIDENTIAL**
Address: Miami Beach Court Facility 1130 Washington Avenue RM. 202, Miami Beach, FL 33139 **PID 47114**
County: Miami-Dade

AGENCY INFORMATION

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

Net Worth

My Net Worth as of June 29, 2023 was \$ 700,188.32.

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Assets

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

The aggregate value of my household goods and personal effect is \$ 65,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Checking Account Wells Fargo (as of March 2, 2023)	\$ 7,963.82
Savings Acct Wells Fargo (as of March 2, 2023)	\$ 10,905.01
Home	\$ 610,000.00
Checking JP Morgan (as of May 18, 2023)	\$ 7,050.94
Savings JP Morgan (as of May 18, 2023)	\$ 5,219.27
Voya	\$ 22,741.03
Vehicle Lease	\$ 20,000.00
JP Morgan Brokerage (different account numbers) (as of May 18, 2023)	\$ 305,980.08
See Attached	

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Voya (2 accounts) (as of May 2023)	230 East Park Avenue, NY, NY 10169	\$ 18,624.48
Cenlar (as of May 2023)	425 Phillips Blvd, Ewing, NJ 08618	\$ 297,722.50
Lincoln Automotive	PO Box 650574, Dallas, TX 75265	\$ 18,481.50

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
This section not amended by filer.			

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.

Amendment Reason

Explanation of changes why are you amending your previous form 6 submission?

I did not include my tax return on the previous form and I put 12/31/22 as the date of my net worth when it is in fact today, June 29, 2023.

Signature of Reporting Official or Candidate

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

Stephanie Rebecca Silver

Digitally signed: 06/29/2023

Filed with COE: 06/29/2023

Stephanie Silver

Additional Assets (listed from Form 6):

Voya Financial, 230 East Park Avenue, New York, NY 10169:	\$22,741.03
Lincoln Automotive Fin (car lease), PO Box 650674, Dallas, TX 75265	\$20,000
JP Morgan Chase (as of May 18, 2023) (****[REDACTED], 10301 S Dixie Hwy, Pinecrest, FL 33156	\$196,140.37
JP Morgan Chase (as of May 18, 2023) (****[REDACTED], 10301 S Dixie Hwy, Pinecrest, FL 33156	\$36,781.79
JP Morgan Chase (as of May 18, 2023) (****[REDACTED], 10301 S Dixie Hwy, Pinecrest, FL 33156	\$73,057.92
Acorns, 5300 California Ave, Irvine, CA 92617	\$56.65

Breakdown of Brokerage Accounts

Voya Financial (as of May 18, 2023), 230 East Park Avenue, New York, NY 10169:

<u>Fund</u>	<u>Shares</u>	<u>Value of Asset</u>
American Funds Am Balanced R6	1087.0944	\$10,727.27
Fidelity Mid Cap	165.3642	\$2394.03
JP Morgan Mid Cap Growth Fund	496.6037	\$5002.13
Vanguard Sm Cap Value Index Fund	106.4091	\$2129.99
Amer Funds New Perspective	242.6542	\$2487.61
Total:		\$22,741.03

J.P. Morgan Chase Managed Brokerage Account... (as of May 18, 2023):

<u>Fund</u>	<u>Shares</u>	<u>Value of Asset</u>
		\$1939.60
BBAX	40	
		\$1999.80
BBCA	33	
		\$20,961.50
SPY	50	
		\$16,549.19
CUSUX	1288.878	
		\$8977.13
VFIAX	23.353	
		\$2,941.30
CASH		
		\$3836.68
CRDOX	446.126	
		\$26,565.85
CBTAX	2741.574	
		\$17,196.37
AIDZX	1739.87	
		\$13,442.40
ATBYX	1250.456	
		\$11,483.88
PRTMX	1018.978	
		\$7,613.34
VMLUX	710.2	
		\$7,621.37
BNMLX	755.339	
		\$6979.64
OSTSX	686.297	
		\$3,856.79
TFEBX	315.355	
		\$13,636.93
SCHO	281	
		2,645.57
WXIUX	195.678	
		\$1973.09
PIMLX	189.356	
		\$1910.92
CUTAX	194.992	
		\$1882.32
SHY	23	
		\$1845.56
VTEB	37	

J.P. Morgan Chase Managed Brokerage Account... (as of May 18, 2023):

<u>Fund</u>	<u>Shares</u>	<u>Value</u>
		3262.70
CIEUX	311.03	
		1480.68
BBEU	27	
		1155.63
BBJP	23	

	14	678.86
BBAX		666.60
	11	9612.89
BBCA	66.493	3711.53
FXAIX	289.06	391.38
CUXUX		715.66
CASH	83.216	4769.11
CRDOX	475.011	3525.41
FIQZX	363.819	1750.54
CBTAX	174.705	2537.04
JITZX	31	1108.00
SHY	109.812	698.32
BNMLX	14	372.38
VTEB	37.998	345.06
CUTAX	33.115	
PIMIX		

J.P. Morgan Brokerage Account (as of May 18, 2023) (Account ***)**

Name	Number of Shares	Value
	354.17	3715.24
Cieux	41	2248.44
BBEU	32	1607.84
BBJP	15	748,50727.35
BBAX	12	727.20
BBCA	75.748	\$10,950.89
FXAIX	480.707	6172.28
CUSUX		\$1098.22
CASH	166.531	1432.17
CRDOX	1137.919	11424.71
FIQZX	1024.732	9929.65
CBTAX	639.311	6405.90
JITZX		

	105	5095.65
SCHO		
	408.066	5095.65
VMLUX		
	281.693	2842.28
BNMLX		
	116.604	1426.07
TFEBX		
	9	736.56
SHY		
	70.255	732.06
PIMIX		
	72.716	712.62
CUTAX		
	14	698.32
VTEB		

1040

Department of the Treasury—Internal Revenue Service

U.S. Individual Income Tax Return

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

Stephanie R

Last name

Silver

Your social security number

Spouse's social security number

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

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

State

ZIP code

Foreign postal code

Foreign province/state/county

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):

If more than four dependents, see instructions and check here ☐

(1) First name Last name

(2) Social security number

(3) Relationship to you

(4) Check the box if qualifies for (see instructions):

Child tax credit

Credit for other dependents

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

- 1a Total amount from Form(s) W-2, box 1 (see instructions) 156,612.
b Household employee wages not reported on Form(s) W-2
c Tip income not reported on line 1a (see instructions)
d Medical waiver payments not reported on Form(s) W-2 (see instructions)
e Taxable dependent care benefits from Form 2441, line 28
f Employer-provided adoption benefits from Form 8839, line 29
g Wages from Form 8919, line 6
h Other earned income (see instructions) 1i
i Nontaxable combat pay election (see instructions)

2 Add lines 1a through 1h

2a Tax-exempt interest 1,009.

3a Qualified dividends 913.

4a IRA distributions

5a Pensions and annuities

6a Social security benefits

7 Capital gain or (loss). Attach Schedule D if required. If not required, check here

8 Other income from Schedule 1, line 10

9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income

10 Adjustments to income from Schedule 1, line 28

11 Subtract line 10 from line 9. This is your adjusted gross income

12 Standard deduction or itemized deductions (from Schedule A)

13 Qualified business income deduction from Form 8965 or Form 8995-A

14 Add lines 12 and 13

15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income

Attach Sch. B if required.

Standard Deduction for—

- Single or Married filing separately, \$12,550
- Married filing jointly or Qualifying surviving spouse, \$25,900
- Head of household, \$18,400
- If you checked any box under Standard Deduction, see instructions.

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

Form 1040 (2022)

Tax and Credits

16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	16	27,945.
17	Amount from Schedule 2, line 3	17	0.
18	Add lines 16 and 17	18	27,945.
19	Child tax credit or credit for other dependents from Schedule 8812	19	
20	Amount from Schedule 3, line 8	20	45.
21	Add lines 19 and 20	21	45.
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	27,900.
23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	0.
24	Add lines 22 and 23. This is your total tax	24	27,900.

Payments

25	Federal income tax withheld from:	25a	29,346.
a	Form(s) W-2	25b	
b	Form(s) 1099	25c	
c	Other forms (see instructions)	25d	29,346.
d	Add lines 25a through 25c	26	
26	2022 estimated tax payments and amount applied from 2021 return	27	
27	Earned income credit (EIC)	28	
28	Additional child tax credit from Schedule 8812	29	
29	American opportunity credit from Form 8863, line 8	30	
30	Reserved for future use	31	
31	Amount from Schedule 3, line 15	32	
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	33	29,346.
33	Add lines 25d, 26, and 32. These are your total payments	34	1,446.
34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	35a	1,446.

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

Refund

Direct deposit? See instructions.

35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here	c Type: ☒ Checking ☐ Savings
b	Routing number	
d	Account number	36
36	Amount of line 34 you want applied to your 2023 estimated tax	

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.	38
38	Estimated tax penalty (see instructions)	

Third Party Designee

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

Instructions: Designee's name _____ Phone no. _____ Personal identification number (PIN) _____

Sign Here

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

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
Phone no. (305) 793-5431	Email address	Date	PTIN
Preparer's name	Preparer's signature	Check if: ☐ Self-employed	

Paid Preparer Use Only

Firm's name Self-Prepared

Firm's address

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

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REV 02/2023 1040-10-23

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. 1546-0074

2022

Attachment
Sequence No. 03

Your social security number

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

Stephanie R Silver

Part II Nonrefundable Credits

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

6a

6b

6c

6d

6e

6f

6g

6h

6i

6j

6k

6l

6m

6z

1

45.

2

3

4

5

7

- 7 Total other nonrefundable credits. Add lines 6a through 6z
- 8 Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20

8

45.

(continued on page 2)

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

BAA

REV 03/2022 501001 03-2022

Schedule 3 (Form 1040) 2022

Schedule 3 (Form 1040) 2022

Part III 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	

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REV 02/21/23 10:00:00 AM

Schedule 3 (Form 1040) 2022

**SCHEDULE A
(Form 1040)**

Department of the Treasury
Internal Revenue Service

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

Stephanie R Silver

Itemized Deductions

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

Caution: If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

OMB No. 1545-0074

2022

Attachment
Sequence No. 07

social security number

[REDACTED]

**Medical
and
Dental
Expenses**

- Caution:** Do not include expenses reimbursed or paid by others.
- 1 Medical and dental expenses (see instructions) **2** 156,903.
 - 2 Enter amount from Form 1040 or 1040-SR, line 11
 - 3 Multiply line 2 by 7.5% (0.075)
 - 4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-

1 0.
3 11,768.
4

**Taxes You
Paid**

- 5 State and local taxes.
a State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box ☒
b State and local real estate taxes (see instructions)
c State and local personal property taxes
d Add lines 5a through 5c
e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)
6 Other taxes. List type and amount:

5a 1,218.
5b 4,248.
5c 95.
5d 5,561.
5e 5,561.
6
7 5,561.

**Interest
You Paid**

Caution: Your mortgage interest deduction may be limited. See instructions.

- 8 Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box ☐
a Home mortgage interest and points reported to you on Form 1098. See instructions if limited
b Home mortgage interest not reported to you on Form 1098. See instructions if limited. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address.
c Points not reported to you on Form 1098. See instructions for special rules
d Reserved for future use
e Add lines 8a through 8c
9 Investment interest. Attach Form 4952 if required. See instructions.
10 Add lines 8e and 9.

8a 8,744.
8b
8c
8d
8e 8,744.
9
10 8,744.

**Gifts to
Charity**

Caution: If you made a gift and got a benefit for it, see instructions.

- 11 Gifts by cash or check. If you made any gift of \$250 or more, see instructions
- 12 Other than by cash or check. If you made any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500.
- 13 Carryover from prior year
- 14 Add lines 11 through 13

11 127.
12
13
14 127.

**Casualty and
Theft Losses**

- 15 Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions
- 16 Other—from list in instructions. List type and amount:

15
16

**Other
Itemized
Deductions**

- 17 Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040 or 1040-SR, line 12
- 18 If you elect to itemize deductions even though they are less than your standard deduction, check this box ☐

17 14,432.
18

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

Your social security number
[REDACTED]

Name(s) shown on return
Stephanie R Silver

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.

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	3,206.	3,427.	7.	-214.
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, 6701, 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 -214.

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	13,261.	14,240.	73.	-906.
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 26.
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 -880.

Reduction Act Notice, see your tax return instructions.

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REV 02/22 (1040) 2022

Schedule D (Form 1040) 2022

Part III Summary

16 Combine lines 7 and 15 and enter the result **18** -1,094.

- 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**

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)

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.

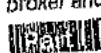
Form **8949**Department of the Treasury
Internal Revenue Service
Name(s) shown on return**Sales and Other Dispositions of Capital Assets**Go to www.irs.gov/Form8949 for instructions and the latest information.
File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

OMB No. 1545-0074

2022Attachment
Sequence No. 12ASocial security number or taxpayer identification number
[REDACTED]

Stephanie R Silver

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**Short-Term.** Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term transactions, see page 2.**Note:** You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions).**You must check Box A, B, or C below. Check only one box.** If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	7 SH. VANGUARD SCOTTSDALE FUNDS VANGUARD SHOR	04/20/21	01/28/22	423.	431.	W	1.	-7.
	36.438 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIE	02/10/21	02/07/22	364.	376.	W	1.	-11.
	0.059 SH. **PINCO TOTAL RETURN FUND INSTL CL	08/02/21	07/22/22	1.	1.			0.
	0.052 SH. **PINCO TOTAL RETURN FUND INSTL CL	09/01/21	07/22/22	0.	1.			-1.
	1.12 SH. **PINCO TOTAL RETURN FUND INSTL CL	09/02/21	07/22/22	10.	12.			-2.
	0.059 SH. **PINCO TOTAL RETURN FUND INSTL CL	10/01/21	07/22/22	1.	1.			0.
	0.066 SH. **PINCO TOTAL RETURN FUND INSTL CL	11/01/21	07/22/22	1.	1.			0.
	0.065 SH. **PINCO TOTAL RETURN FUND INSTL CL	12/01/21	07/22/22	1.	1.			0.
	0.066 SH. **PINCO TOTAL RETURN FUND INSTL CL	12/29/21	07/22/22	1.	1.			0.
	0.066 SH. **PINCO TOTAL RETURN FUND INSTL CL	01/03/22	07/22/22	1.	1.			-2.
	1.325 SH. **PINCO TOTAL RETURN FUND INSTL CL	01/25/22	07/22/22	12.	14.			0.
	0.067 SH. **PINCO TOTAL RETURN FUND INSTL CL	02/01/22	07/22/22	1.	1.			0.
	0.067 SH. **PINCO TOTAL RETURN FUND INSTL CL	03/01/22	07/22/22	1.	1.			0.
	0.074 SH. **PINCO TOTAL RETURN FUND INSTL CL	04/01/22	07/22/22	1.	1.			0.
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).				818.	843.		2.	-23.

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 amount in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Form 8949 (2022)

Form 8949

Department of the Treasury
Internal Revenue Service

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.

OMB No. 1545-0074

2022

Attachment
Sequence No. 12A

Name(s) shown on return

Stephanie R Silver

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (g) 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	
	1,078 SH. **PIMCO TOTAL RETURN FUND INSTL CL	04/21/22	07/22/22	19.	22.			-3.
	0,082 SH. **PIMCO TOTAL RETURN FUND INSTL CL	05/02/22	07/22/22	1.	1.			0.
	0,079 SH. **PIMCO TOTAL RETURN FUND INSTL CL	06/01/22	07/22/22	1.	1.			0.
	0,066 SH. **PIMCO TOTAL RETURN FUND INSTL CL	07/01/22	07/22/22	1.	1.			0.
	2 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	10/08/21	08/05/22	96.	115.			-19.
	1 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	01/25/22	08/05/22	48.	56.			-8.
	2 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	05/09/22	08/05/22	96.	100.			-4.
	0,218 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	12/13/21	10/11/22	8.	10.			-2.
	0,191 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	01/25/22	10/11/22	7.	9.			-2.
	1 SH. VANGUARD SCOTTSDALE FUNDS VANGUARD SHOR	01/25/22	10/11/22	58.	62.			-4.
	1,171 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	04/21/22	10/11/22	6.	8.			-2.
	0,375 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	05/09/22	10/11/22	13.	17.			-4.
	3 SH. SCHWAB STRATEGIC TR INTERMEDIATE-TERM U	09/02/21	01/31/22	276.	292.			-16.
	76,405 SH. **SIX CIRCLES TRUST CREDIT OPPORTUNITIES	02/10/21	02/08/22	783.	812.	W		-29.
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).							
				1,413.	1,506.			0.
								-93.

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.

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

REV 02/22/23 10/10/23 dph

Form 8949 (2022)

Form **8949**Department of the Treasury
Internal Revenue Service**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.

OMB No. 1545-0074

2022Attachment
Sequence No. 12A

Name(s) shown on return

Stephanie R Silver

Social security number or taxpayer identification number

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

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
☐ (B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
☐ (C) Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (f) 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	
	42.415 SH. *VANGUARD FUND BOND FUND 110 TERM TAX E	07/28/21	07/14/22	490.	511.	W	5.	-16.
	1 SH. SCHWAB STRATEGIC DR INTERMEDIATE-TERM U	05/27/22	07/14/22	51.	52.			-1.
	1 SH. J P MORGAN EXCHANGE TRADED FUND FOR BETABU	09/02/21	08/04/22	338.	428.			-90.
	1 SH. J P MORGAN EXCHANGE TRADED FUND FOR BETABU	07/14/22	08/04/22	96.	87.			9.
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).			975.	1,078.		5.	-98.

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 amount in column (f) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

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

Stephanie R Silver

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Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

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You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

23 (D) Long-term transactions reported on Form(s) 1099-B									
(E) Long-term transactions not reported to you on Form 1099-B									
(F) Long-term transactions not reported to you on Form 1099-B									
1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis (See the Note below and see Column (e) in the separate instructions.)	(f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).	
								-1.	
	2 SH. 13SHARES TRUST 13SHARES SHORT TREASURY BO	01/27/21	01/28/22	331.	332.			82.	
	1,383 SH. **FIDELITY SALUTY STR TR FIDELITY SOB IN	06/24/20	04/21/22	516.	434.			1.	
	1 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	01/27/21	04/21/22	55.	58.	W	4.	26.	
	2 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	01/27/21	04/21/22	138.	112.			0.	
	5,978 SH. **SIX CIRCLES TR C S UNCONSTRAINED EOI	01/27/21	04/21/22	81.	83.	W	2.	20.	
	1,481 SH. **FIDELITY SALUTY STR TR FIDELITY SOB IN	06/24/20	06/01/22	211.	191.			-12.	
	12 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	01/27/21	06/01/22	619.	633.	W	2.	-15.	
	3 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	04/20/21	06/01/22	155.	170.			-12.	
	11,407 SH. **JPMORGAN ON I NATIONAL MUNICIPAL INCK	06/24/20	06/15/22	114.	127.	W	1.	-27.	
	29,97 SH. **FIDELITY SEC STR TR ADVISOR INTER EOI	06/24/20	06/15/22	296.	324.	W	1.	-18.	
	22,704 SH. **SIX CIRCLES TR TAY ANARE BO FD	08/31/20	06/15/22	215.	234.	W	1.	-37.	
	28,841 SH. **PIMCO TOTAL RETURN FUND INSTL CL	01/27/21	07/22/22	263.	300.			0.	
	0,007 SH. **PIMCO TOTAL RETURN FUND INSTL CL	02/01/21	07/22/22	0.	0.			-1.	
	0,043 SH. **PIMCO TOTAL RETURN FUND INSTL CL	03/01/21	07/22/22	0.	1.				
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked).				2,994.	2,999.		11.	6.

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

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

Social security number or taxpayer identification number

Stephanie R Silver

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- ☒ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
☐ (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	3,506 SH. **PIMCO TOTAL RETURN FUND INSTL CL	03/18/21	07/22/22	32.	37.			-5.
	0.053 SH. **PIMCO TOTAL RETURN FUND INSTL CL	04/01/21	07/22/22	0.	1.			-1.
	0.062 SH. **PIMCO TOTAL RETURN FUND INSTL CL	05/03/21	07/22/22	1.	1.			0.
	0.052 SH. **PIMCO TOTAL RETURN FUND INSTL CL	06/01/21	07/22/22	0.	1.			-1.
	0.054 SH. **PIMCO TOTAL RETURN FUND INSTL CL	07/01/21	07/22/22	0.	1.			-1.
	1,627 SH. **PIMCO TOTAL RETURN FUND INSTL CL	07/15/21	07/22/22	15.	17.			-2.
	3 SH. J P MORGAN EXCHANGE TRADED FID TR RETABD	04/20/21	08/05/22	143.	170.			-27.
	5 SH. J P MORGAN EXCHANGE TRADED FID TR RETABD	05/19/21	08/05/22	239.	292.			-53.
	1 SH. J P MORGAN EXCHANGE TRADED FID TR RETABD	07/12/21	08/05/22	48.	59.			-11.
	4,648 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	01/27/21	10/11/22	238.	305.			-67.
	0.291 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	03/18/21	10/11/22	10.	13.			-3.
	0.015 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	04/12/21	10/11/22	1.	1.			0.
	19 SH. VANGUARD SCOTTSDALE FUNDS VANGUARD SHOR	04/20/21	10/11/22	577.	615.			-38.
	0.156 SH. **FIDELITY SALEM STR TR INTERNATIONAL I	07/15/21	10/11/22	6.	7.			-1.
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked).				1,310.	1,520.		-210.

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Form 8949 (2022)

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

Social security number or taxpayer identification number

Stephanie R Silver

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

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis (see the Note below and see Column (f) 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	
1 SH. VANGUARD SCOTSDALE FUNDS VANGUARD SISR	09/02/21	10/11/22	58.	61.			-3.
0.399 SH. **FIDELITY SAGEH STR TR INTERNATIONAL I	10/08/21	10/11/22	14.	18.			-4.
6 SH. SCHWAB STRATEGIC TR INTERMEDIATE-TERM U	11/25/20	01/31/22	442.	466.			-24.
16 SH. SCHWAB STRATEGIC TR INTERMEDIATE-TERM U	01/13/21	01/31/22	828.	867.			-39.
2,827 SH. **FIDELITY SAGEH STR TR FIDELITY 500 IN	11/25/20	05/27/22	409.	385.			24.
3 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	01/26/21	05/27/22	158.	157.			1.
22 SH. J P MORGAN EXCHANGE TRADED FD TR BETABU	05/14/21	05/27/22	1,155.	1,298.			-143.
1,508 SH. **FIDELITY SAGEH STR TR FIDELITY 500 IN	11/25/20	06/08/22	216.	205.			11.
17,505 SH. **SIX CIRCLES TR TAX MANE BD FD	11/25/20	06/08/22	170.	182.	W	2.	-10.
28,536 SH. **FIDELITY SCH STR TR ADVISOR TOWER MAN	11/25/20	06/08/22	292.	314.	W	3.	-19.
2,063 SH. **PIMCO INCOME FD INSTL CL	11/25/20	07/14/22	22.	25.	W	1.	-2.
31,754 SH. **SIX CIRCLES TR TAX MANE BD FD	11/25/20	07/14/22	308.	331.	W	1.	-22.
32,321 SH. **JPMORGAN TR 1 NATIONAL PRINCIPAL BUCH	11/25/20	07/14/22	328.	363.	W	3.	-32.
43,599 SH. **FIDELITY SCH STR TR ADVISOR TOWER MAN	11/25/20	07/14/22	438.	472.	W	2.	-32.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked).				4,838.	5,144.	12.	-294.

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

Form 8949 (2022)

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

Social security number or taxpayer identification number

Stephanie R Silver

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

Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- ☒ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
☐ (F) Long-term transactions not reported to you on Form 1099-B

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (f) 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	
8,766 SH. **SIX CIRCLES TR TRX AMNE ULTRA SHORT	11/25/20	07/14/22	86.	88.	W	0.	-2.
5,122 SH. **TRX EXHIBIT BD FD AVES CL P 3	01/13/21	07/14/22	63.	70.	W	1.	-6.
9,833 SH. **BLACKROCK HNW BD FD DIC NATIONAL FUND	01/13/21	07/14/22	101.	111.	W	2.	-8.
2 SH. SCHWAB STRATEGIC TR SHORT-TERM US TREAS	04/20/21	07/14/22	98.	103.			-5.
6,458 SH. **SIX CIRCLES TR TRX UNCONSTRAINED EQU	11/25/20	08/04/22	61.	66.	W	5.	0.
2,105 SH. **SIX CIRCLES TR TRX UNCONSTRAINED EQU	12/18/20	08/04/22	20.	21.	W	2.	1.
4,397 SH. **SIX CIRCLES TR TRX UNCONSTRAINED EQU	12/18/20	08/04/22	79.	86.	W	6.	-1.
76,547 SH. **SIX CIRCLES TR TRX UNCONSTRAINED EQU	01/13/21	08/04/22	722.	781.	W	27.	-32.
7 SH. J P MORGAN EXCHANGE TRADED FD TR B2YABU	05/14/21	08/04/22	338.	413.			-75.
4,524 SH. **FIDELITY SALEM SR TR FIDELITY 300 IW	11/25/20	10/11/22	564.	615.	W	6.	-45.
46,953 SH. **SIX CIRCLES TR TRX UNCONSTRAINED EQU	01/13/21	10/11/22	371.	484.			-113.
7,845 SH. **SIX CIRCLES TR TRX UNCONSTRAINED EQU	04/20/21	10/11/22	62.	81.			-19.
147,417 SH. **VANGUARD HNW BOND FUND LTD TERM TAX L	07/28/21	10/11/22	1,554.	1,658.	W	1.	-103.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked).				4,119.	4,577.	50.	-408.

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

Form **8995****Qualified Business Income Deduction
Simplified Computation**

OMB No. 1545-2294

2022Attachment
Sequence No. 55Department of the Treasury
Internal Revenue Service

Attach to your tax return.

Go to www.irs.gov/Form8995 for instructions and the latest information.

Your taxpayer identification number

Name(s) shown on return

Stephanie R Silver

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

Use this form if your taxable income, before your qualified business income deduction, is at or below \$170,050 (\$340,100 if married filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i			
ii			
iii			
iv			
v			
2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)		21.
3	Qualified business net (loss) carryforward from the prior year		
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-		21.
5	Qualified business income component. Multiply line 4 by 20% (0.20)		4.
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions)		21.
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year		
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0-		21.
9	REIT and PTP component. Multiply line 8 by 20% (0.20)		4.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9		4.
11	Taxable income before qualified business income deduction (see instructions)		142,471.
12	Net capital gain (see instructions)		913.
13	Subtract line 12 from line 11. If zero or less, enter -0-		141,558.
14	Income limitation. Multiply line 13 by 20% (0.20)		28,312.
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also enter this amount on the applicable line of your return (see instructions)		4.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-		0.
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-		0.

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

REV 02/2022 1040193-00

Form **8995** (2022)