

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 09/01/2023

General Information

Name: Rafael E. Martinez

Address: 1115 Woodland St, Orlando, FL 32806

PID 283536

County: Orange

AGENCY INFORMATION

Organization	Suborganization	Title
Central Florida Expressway Authority (CFX)	Authority Members	Governing Board

Net Worth

My Net Worth as of December 31, 2022 was \$ 7,846,000.00.

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 \$ 115,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Commercial Real Estate Building 50% Ownership	\$ 900,000.00
1115 WOODLAND STREET ORLANDO 32806	\$ 1,000,000.00
SEE ATTACHED MARTINEZ FAMILY NET WORTH SCHEDULE	\$ 5,946,707.00

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
McEwan-Edwards Bldg, LLC	108 E Central Blvd	\$ 78,345.00
McEwan Martinez Dukes Hall	108 E Central Blvd K-1	\$ 423,046.00
McEwan Martinez Dukes Hall	108 E Central Blvd W2	\$ 281,801.00
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.

Rafael E. Martinez

Digitally signed: 09/01/2023

Filed with COE: 09/01/2023

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 RAFAEL E.		Last name MARTINEZ		Your social security number [REDACTED]	
If joint return, spouse's first name and middle initial REBECCA E.		Last name MARTINEZ		Spouse's social security number [REDACTED]	
Home address (number and street). If you have a P.O. box, see instructions. 1115 WOODLAND STREET				Apt. no.	
City, town, or post office. If you have a foreign address, also complete spaces below. ORLANDO				State ZIP code FL 32806	
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 dependents

If more than four dependents, see instr. and check here ☐

Income		STMT 1		1a 281,801.	
1a Total amount from Form(s) W-2, box 1 (see instructions)				1a	
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 281,801.	
2a Tax-exempt interest		2a 3,893.	b Taxable interest	2b 1,582.	
3a Qualified dividends		3a 16,957.	b Ordinary dividends	3b 27,228.	
4a IRA distributions		4a	b Taxable amount	4b	
5a Pensions and annuities		5a	b Taxable amount	5b	
6a Social security benefits		6a 49,347.	b Taxable amount	6b 41,945.	
c If you elect to use the lump-sum election method, check here (see instructions)				7 23,991.	
7 Capital gain or (loss). Attach Schedule D if required. If not required, check here				8 490,755.	
8 Other income from Schedule 1, line 10				9 867,302.	
9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income				10 19,801.	
10 Adjustments to income from Schedule 1, line 26				11 847,501.	
11 Subtract line 10 from line 9. This is your adjusted gross income				12 136,074.	
12 Standard deduction or itemized deductions (from Schedule A)				13 26.	
13 Qualified business income deduction from Form 8995 or Form 8995-A				14 136,100.	
14 Add lines 12 and 13				15 711,401.	
15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income					

LHA 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	190,807.
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	190,807.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	129.
	21	Add lines 19 and 20	21	129.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	190,678.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	3,726.
24	Add lines 22 and 23. This is your total tax	24	194,404.	

Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2	SEE STATEMENT 6	25a 96,940.
	b	Form(s) 1099		25b
	c	Other forms (see instructions)	SEE STATEMENT 8	25c 801.
	d	Add lines 25a through 25c		25d 97,741.
	26	2022 estimated tax payments and amount applied from 2021 return	STATEMENT 7	26 140,000.
	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	237,741.	

Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	43,337.
	35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here ☐	35a	43,337.
	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	
	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	Phone no.	Personal identification number (PIN)

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
	ATTORNEY		
	Spouse's signature. If a joint return, both must sign.		

Spouse's signature	Date	Spouse's occupation
	HOUSEWIFE	
	Phone no.	
	Email address RMARTINEZ@MMDORL.COM	

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
	J. ALDEN BAKER, CPA	J. ALDEN BAKER, CPA		P00599377	

Firm's name	BAKER, HYATT, HOMRICH & ZOKVIC, P.A.	Phone no.	(407) 425-5200
Firm's address	2203 EAST MICHIGAN STREET ORLANDO, FL 32806-4944	Firm's EIN	59-3096580

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

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

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	490,755.
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	490,755.

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

Schedule 1 (Form 1040) 2022

Part II Adjustments to Income

11	Educator expenses	11	
12	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	12	
13	Health savings account deduction. Attach Form 8889	13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903	14	
15	Deductible part of self-employment tax. Attach Schedule SE	15	
16	Self-employed SEP, SIMPLE, and qualified plans	16	
17	Self-employed health insurance deduction	17	19,801.
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	19,801.

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

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐	8	
9	Household employment taxes. Attach Schedule H	9	1,408.
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10	
11	Additional Medicare Tax. Attach Form 8959	11	351.
12	Net investment income tax. Attach Form 8960	12	1,967.
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)

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

Schedule 2 (Form 1040) 2022

Part II Other Taxes (continued)

17	Other additional taxes:			
a	Recapture of other credits. List type, form number, and amount	17a		
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	17b		
c	Additional tax on HSA distributions. Attach Form 8889	17c		
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17d		
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e		
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f		
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g		
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h		
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i		
j	Section 72(m)(5) excess benefits tax	17j		
k	Golden parachute payments	17k		
l	Tax on accumulation distribution of trusts	17l		
m	Excise tax on insider stock compensation from an expatriated corporation	17m		
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n		
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o		
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p		
q	Any interest from Form 8621, line 24	17q		
z	Any other taxes. List type and amount:	17z		
18	Total additional taxes. Add lines 17a through 17z		18	
19	Reserved for future use		19	
20	Section 965 net tax liability installment from Form 965-A	20		
21	Add lines 4, 7 through 16, and 18. These are your total other taxes . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		21	3,726.

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

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	129.
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441	2	
3	Education credits from Form 8863, line 19	3	
4	Retirement savings contributions credit. Attach Form 8880	4	
5	Residential energy credits. Attach Form 5695	5	
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800	6a	
b	Credit for prior year minimum tax. Attach Form 8801	6b	
c	Adoption credit. Attach Form 8839	6c	
d	Credit for the elderly or disabled. Attach Schedule R	6d	
e	Alternative motor vehicle credit. Attach Form 8910	6e	
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f	
g	Mortgage interest credit. Attach Form 8396	6g	
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h	
i	Qualified electric vehicle credit. Attach Form 8834	6i	
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j	
k	Credit to holders of tax credit bonds. Attach Form 8912	6k	
l	Amount on Form 8978, line 14. See instructions	6l	
z	Other nonrefundable credits. List type and amount:	6z	
7	Total other nonrefundable credits. Add lines 6a through 6z	7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20	8	129.

(continued on page 2)

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

Schedule 3 (Form 1040) 2022

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962	9	
10	Amount paid with request for extension to file (see instructions)	10	
11	Excess social security and tier 1 RRTA tax withheld	11	
12	Credit for federal tax on fuels. Attach Form 4136	12	
13	Other payments or refundable credits:		
a	Form 2439	13a	
b	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b	
c	Reserved for future use	13c	
d	Credit for repayment of amounts included in income from earlier years	13d	
e	Reserved for future use	13e	
f	Deferred amount of net 965 tax liability (see instructions)	13f	
g	Reserved for future use	13g	
h	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021	13h	
z	Other payments or refundable credits. List type and amount:	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31	15	

Schedule 3 (Form 1040) 2022

SCHEDULE A
(Form 1040)

Department of the Treasury
Internal Revenue Service

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**

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

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ

Medical and Dental Expenses	Caution: Do not include expenses reimbursed or paid by others.				
	1 Medical and dental expenses (see instructions) SEE STATEMENT 11	1	6,532.		
	2 Enter amount from Form 1040 or 1040-SR, line 11 2 847,501.	2	847,501.		
	3 Multiply line 2 by 7.5% (0.075)	3	63,563.		
	4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4		0.	
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 SEE STATEMENT 12 ☒	5a	2,057.		
	b State and local real estate taxes (see instructions)	5b	8,341.		
	c State and local personal property taxes	5c			
	d Add lines 5a through 5c	5d	10,398.		
	e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)	5e	10,000.		
	6 Other taxes. List type and amount:	6			
	7 Add lines 5e and 6	7		10,000.	
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	8a			
	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	8b			
	c Points not reported to you on Form 1098. See instructions for special rules	8c			
	d Reserved for future use	8d			
	e Add lines 8a through 8c	8e			
	9 Investment interest. Attach Form 4952 if required. See instructions	9			
	10 Add lines 8e and 9	10			
	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	11	5,278.	STMT 10
		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	12	120,796.	
13 Carryover from prior year		13			
14 Add lines 11 through 13		14		126,074.	
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	15			
Other Itemized Deductions	16 Other - from list in instructions. List type and amount:	16			
Total 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	17		136,074.	
	18 If you elect to itemize deductions even though they are less than your standard deduction, check this box ☐				

SCHEDULE B

(Form 1040)

Department of the Treasury

Internal Revenue Service

Name(s) shown on return

Interest and Ordinary Dividends

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

Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

2022

Attachment Sequence No. 08

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ
Part I
Interest

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address _____
- JPMORGAN CHASE BANK NA _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- FROM K-1 - MCEWAN-EDWARDS BUILDING, LLC _____
- FROM K-1 - MCEWAN, MARTINEZ., DUKES & HALL P.A. _____
- FROM K-1 - CSE MIXED USE- MULTIFAMILY FUND IV LLC _____

Amount

91.

62.

1,128.

33.

253.

15.

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

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

1,582.

1,582.

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

Part II
Ordinary Dividends

- 5 List name of payer _____
- CONVERSUS STEPSTONE PRIVATE MARKETS _____
- SREIT CLASS T SHARES _____
- TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE _____
- TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE _____
- VINEBROOK HOMES TRUST, INC. A _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- FROM K-1 - CSE MIXED USE- MULTIFAMILY FUND IV LLC _____

2,278.

384.

25.

8,142.

20,109.

183.

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

SUBTOTAL FOR LINE 5 _____

TAX-EXEMPT DIVIDENDS **SEE STATEMENT 14** _____

31,121.

-3,893.

27,228.

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

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

Part III
Foreign Accounts and Trusts

Caution: If required, failure to file Fin CEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instr. 12-07-22

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

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

Yes No

X

X

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ

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		26.		<26.>
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7 <26.>

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 1,047.
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 22,970.
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 24,017.

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

Schedule D (Form 1040) 2022

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	23,991.
• 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.	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.		

Qualified Dividends and Capital Gain Tax Worksheet - Line 16

Keep for Your Records

Name(s) shown on return RAFAEL E. & REBECCA E. MARTINEZ	Your SSN [REDACTED]
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Before you begin:

- ✓ See the earlier instructions for line 16 to see if you can use this worksheet to figure your tax.
- ✓ Before completing this worksheet, complete Form 1040 or 1040-SR through line 15.
- ✓ If you don't have to file Schedule D and you received capital gain distributions, be sure you checked the box on Form 1040 or 1040-SR, line 7.

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	<u>711,401.</u>
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	<u>16,957.</u>
3. Are you filing Schedule D?*		
☒ Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or a loss, enter -0-.	3.	<u>23,991.</u>
☐ No. Enter the amount from Form 1040 or 1040-SR, line 7.		
4. Add lines 2 and 3	4.	<u>40,948.</u>
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	<u>670,453.</u>
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.	6.	<u>83,350.</u>
7. Enter the smaller of line 1 or line 6	7.	<u>83,350.</u>
8. Enter the smaller of line 5 or line 7	8.	<u>83,350.</u>
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	<u>0.</u>
10. Enter the smaller of line 1 or line 4	10.	<u>40,948.</u>
11. Enter the amount from line 9	11.	<u>0.</u>
12. Subtract line 11 from line 10	12.	<u>40,948.</u>
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.	13.	<u>517,200.</u>
14. Enter the smaller of line 1 or line 13	14.	<u>517,200.</u>
15. Add lines 5 and 9	15.	<u>670,453.</u>
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	<u>0.</u>
17. Enter the smaller of line 12 or line 16	17.	<u>0.</u>
18. Multiply line 17 by 15% (0.15)	18.	<u>0.</u>
19. Add lines 9 and 17	19.	<u>0.</u>
20. Subtract line 19 from line 10	20.	<u>40,948.</u>
21. Multiply line 20 by 20% (0.20)	21.	<u>8,190.</u>
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	<u>182,617.</u>
23. Add lines 18, 21, and 22	23.	<u>190,807.</u>
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	<u>197,767.</u>
25. Tax on all taxable income. Enter the smaller of line 23 or 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	<u>190,807.</u>

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

Name(s) shown on return. Do not enter name and Social Security number if shown on page 1.

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ**Caution:** The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.**Part II Income or Loss From Partnerships and S Corporations**

Note: If you report a loss, receive a distribution, dispose of stock, or receive a loan repayment from an S corporation, you **must** check the box in column (e) on line 28 and attach the required basis computation. If you report a loss from an at-risk activity for which **any** amount is **not** at risk, you **must** check the box in column (f) on line 28 and attach **Form 6198**. See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section ☒ **Yes** ☐ **No**

28	(a) Name	(b) Enter P for partnership, S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if basis computation is required	(f) Check if any amount is not at risk
A	SEE STATEMENT 18					
B						
C						
D						

Passive Income and Loss		Nonpassive Income and Loss		
(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss allowed (see Schedule K-1)	(j) Section 179 expense deduction from Form 4582	(k) Nonpassive income from Schedule K-1
A				
B				
C				
D				
29a Totals		1,867.		497,179.
b Totals	2,914.	5,377.		
30 Add columns (h) and (k) of line 29a			30	499,046.
31 Add columns (g), (i), and (j) of line 29b			31	(8,291.)
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31			32	490,755.

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A		
B		

Passive Income and Loss		Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A			
B			
34a Totals			
b Totals			
35 Add columns (d) and (f) of line 34a			35
36 Add columns (c) and (e) of line 34b			36 ()
37 Total estate and trust income or (loss). Combine lines 35 and 36			37

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b
39	Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below				39

Part V Summary

40	Net farm rental income or (loss) from Form 4835 . Also, complete line 42 below	40	
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Schedule 1 (Form 1040), line 5	41	490,755.
42	Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120-S), box 17, code AD; and Schedule K-1 (Form 1041), box 14, code F. See instructions.	42	
43	Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040, Form 1040-SR, or Form 1040-NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Form **4797**Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Sales of Business Property
(Also Involuntary Conversions and Recapture Amounts
Under Sections 179 and 280F(b)(2))

Attach to your tax return.

Go to www.irs.gov/Form4797 for instructions and the latest information.

OMB No. 1545-0184

2022Attachment
Sequence No. **27****RAFAEL E. & REBECCA E. MARTINEZ**

Identifying number

- 1a** Enter the gross proceeds from sales or exchanges reported to you for 2022 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20
- 1b** Enter the total amount of gain that you are including on lines 2, 10, and 24 due to the partial dispositions of MACRS assets
- 1c** Enter the total amount of loss that you are including on lines 2 and 10 due to the partial dispositions of MACRS assets

1a**1b****1c****Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft—Most Property Held More Than 1 Year** (see instructions)

2	(a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
	CSE OPORTUNITY FUND						
	II LLC						1,047.

- 3** Gain, if any, from Form 4684, line 39
- 4** Section 1231 gain from installment sales from Form 6252, line 26 or 37
- 5** Section 1231 gain or (loss) from like-kind exchanges from Form 8824
- 6** Gain, if any, from line 32, from other than casualty or theft
- 7** Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows

3**4****5****6****7****1,047.****Partnerships and S corporations.** Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.**Individuals, partners, S corporation shareholders, and all others.** If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you didn't have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.

- 8** Nonrecaptured net section 1231 losses from prior years. See instructions
- 9** Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return. See instructions

8**9****Part II Ordinary Gains and Losses** (see instructions)**10** Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

MCEWAN, MARTINEZ.,							
DUKES & HALL P.A.				2,724.	0.	2,724.	0.

- 11** Loss, if any, from line 7
- 12** Gain, if any, from line 7 or amount from line 8, if applicable
- 13** Gain, if any, from line 31
- 14** Net gain or (loss) from Form 4684, lines 31 and 38a
- 15** Ordinary gain from installment sales from Form 6252, line 25 or 36
- 16** Ordinary gain or (loss) from like-kind exchanges from Form 8824
- 17** Combine lines 10 through 16
- 18** For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below.
- a** If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions
- b** Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Schedule 1 (Form 1040), Part I, line 4

11**12****13****14****15****16****17****18a****18b**

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **4797** (2022)

Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property:		(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)
A			
B			
C			
D			
These columns relate to the properties on lines 19A through 19D.		Property A	Property B
		Property C	Property D
20 Gross sales price (Note: See line 1a before completing.)	20		
21 Cost or other basis plus expense of sale	21		
22 Depreciation (or depletion) allowed or allowable	22		
23 Adjusted basis. Subtract line 22 from line 21	23		
24 Total gain. Subtract line 23 from line 20	24		
25 If section 1245 property:			
a Depreciation allowed or allowable from line 22	25a		
b Enter the smaller of line 24 or 25a	25b		
26 If section 1250 property: If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291.			
a Additional depreciation after 1975. See instructions	26a		
b Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions	26b		
c Subtract line 26a from line 24. If residential rental property or line 24 isn't more than line 26a, skip lines 26d and 26e	26c		
d Additional depreciation after 1969 and before 1976	26d		
e Enter the smaller of line 26c or 26d	26e		
f Section 291 amount (corporations only)	26f		
g Add lines 26b, 26e, and 26f	26g		
27 If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership.			
a Soil, water, and land clearing expenses	27a		
b Line 27a multiplied by applicable percentage	27b		
c Enter the smaller of line 24 or 27b	27c		
28 If section 1254 property:			
a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions	28a		
b Enter the smaller of line 24 or 28a	28b		
29 If section 1255 property:			
a Applicable percentage of payments excluded from income under section 126. See instructions	29a		
b Enter the smaller of line 24 or 29a. See instructions	29b		

Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

30 Total gains for all properties. Add property columns A through D, line 24	30	
31 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13	31	
32 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6	32	

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

	(a) Section 179	(b) Section 280F(b)(2)
33 Section 179 expense deduction or depreciation allowable in prior years	33	
34 Recomputed depreciation. See instructions	34	
35 Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35	

Alternative Minimum Tax - Individuals

Go to www.irs.gov/Form6251 for instructions and the latest information.
Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022
Attachment
Sequence No. **32**

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

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ

Part I Alternative Minimum Taxable Income

1	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract line 14 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	1	711,401.
2a	If filing Schedule A (Form 1040), enter the taxes from Schedule A, line 7; otherwise, enter the amount from Form 1040 or 1040-SR, line 12	2a	10,000.
2b	Tax refund from Schedule 1 (Form 1040), line 1 or line 8z	2b	
2c	Investment interest expense (difference between regular tax and AMT)	2c	
2d	Depletion (difference between regular tax and AMT)	2d	
2e	Net operating loss deduction from Schedule 1 (Form 1040), line 8a. Enter as a positive amount	2e	
2f	Alternative tax net operating loss deduction	2f	
2g	Interest from specified private activity bonds exempt from the regular tax SEE STATEMENT 21	2g	529.
2h	Qualified small business stock, see instructions	2h	
2i	Exercise of incentive stock options (excess of AMT income over regular tax income)	2i	
2j	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	2j	
2k	Disposition of property (difference between AMT and regular tax gain or loss)	2k	
2l	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	2l	
2m	Passive activities (difference between AMT and regular tax income or loss) SEE STATEMENT 19	2m	0.
2n	Loss limitations (difference between AMT and regular tax income or loss) SEE STATEMENT 20	2n	-145.
2o	Circulation costs (difference between regular tax and AMT)	2o	
2p	Long-term contracts (difference between AMT and regular tax income)	2p	
2q	Mining costs (difference between regular tax and AMT)	2q	
2r	Research and experimental costs (difference between regular tax and AMT)	2r	
2s	Income from certain installment sales before January 1, 1987	2s	
2t	Intangible drilling costs preference	2t	
3	Other adjustments, including income-based related adjustments	3	
4	Alternative minimum taxable income. Combine lines 1 through 3. (If married filing separately and line 4 is more than \$776,100, see instructions.)	4	721,785.

Part II Alternative Minimum Tax (AMT)

5	Exemption. <table border="0"> <tr> <td>IF your filing status is ...</td> <td>AND line 4 is not over ...</td> <td>THEN enter on line 5 ...</td> </tr> <tr> <td>Single or head of household</td> <td>\$539,900</td> <td>\$75,900</td> </tr> <tr> <td>Married filing jointly or qualifying widow(er)</td> <td>1,079,800</td> <td>118,100</td> </tr> <tr> <td>Married filing separately</td> <td>539,900</td> <td>59,050</td> </tr> </table> If line 4 is over the amount shown above for your filing status, see instructions.	IF your filing status is ...	AND line 4 is not over ...	THEN enter on line 5 ...	Single or head of household	\$539,900	\$75,900	Married filing jointly or qualifying widow(er)	1,079,800	118,100	Married filing separately	539,900	59,050	5	118,100.
IF your filing status is ...	AND line 4 is not over ...	THEN enter on line 5 ...													
Single or head of household	\$539,900	\$75,900													
Married filing jointly or qualifying widow(er)	1,079,800	118,100													
Married filing separately	539,900	59,050													
6	Subtract line 5 from line 4. If more than zero, go to line 7. If zero or less, enter -0- here and on lines 7, 9, and 11, and go to line 10	6	603,685.												
7	- If you are filing Form 2555, see instructions for the amount to enter. - If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; you reported qualified dividends on Form 1040 or 1040-SR, line 3a; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 40 here. All others: If line 6 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result.	7	161,634.												
8	Alternative minimum tax foreign tax credit (see instructions)	8	129.												
9	Tentative minimum tax. Subtract line 8 from line 7	9	161,505.												
10	Add Form 1040 or 1040-SR, line 16 (minus any tax from Form 4972), and Schedule 2 (Form 1040), line 2. Subtract from the result Schedule 3 (Form 1040), line 1 and any negative amount reported on Form 8978, line 14 (treated as a positive number). If zero or less, enter -0-. If you used Schedule J to figure your tax on Form 1040 or 1040-SR, line 16, refigure that tax without using Schedule J before completing this line. See instructions	10	190,678.												
11	AMT. Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1	11	0.												

Part III Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 7 or by the Foreign Earned Income Tax Worksheet in the instructions.

12 Enter the amount from Form 6251, line 6. If you are filing Form 2555, enter the amount from line 3 of the worksheet in the instructions for line 7	12	603,685.
13 Enter the amount from line 4 of the Qualified Dividends and Capital Gain Tax Worksheet in the Instructions for Form 1040 or the amount from line 13 of the Schedule D Tax Worksheet in the Instructions for Schedule D (Form 1040), whichever applies (as figured for the AMT, necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	13	40,948.
14 Enter the amount from Schedule D (Form 1040), line 19 (as figured for the AMT, if necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	14	
15 If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 13. Otherwise, add lines 13 and 14, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as figured for the AMT, if necessary). If you are filing Form 2555, see instructions for the amount to enter	15	40,948.
16 Enter the smaller of line 12 or line 15	16	40,948.
17 Subtract line 16 from line 12	17	562,737.
18 If line 17 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result	18	153,444.
19 Enter: • \$83,350 if married filing jointly or qualifying widow(er), • \$41,675 if single or married filing separately, or • \$55,800 if head of household.	19	83,350.
20 Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 14 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	20	670,453.
21 Subtract line 20 from line 19. If zero or less, enter -0-	21	0.
22 Enter the smaller of line 12 or line 13	22	40,948.
23 Enter the smaller of line 21 or line 22. This amount is taxed at 0%	23	0.
24 Subtract line 23 from line 22	24	40,948.
25 Enter: • \$459,750 if single, • \$258,600 if married filing separately, • \$517,200 if married filing jointly or qualifying widow(er), or • \$488,500 if head of household.	25	517,200.
26 Enter the amount from line 21	26	0.
27 Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 21 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	27	670,453.
28 Add line 26 and line 27	28	670,453.
29 Subtract line 28 from line 25. If zero or less, enter -0-	29	0.
30 Enter the smaller of line 24 or line 29	30	0.
31 Multiply line 30 by 15% (0.15)	31	
32 Add lines 23 and 30	32	0.
If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33.		
33 Subtract line 32 from line 22	33	40,948.
34 Multiply line 33 by 20% (0.20)	34	8,190.
If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35.		
35 Add lines 17, 32, and 33	35	
36 Subtract line 35 from line 12	36	
37 Multiply line 36 by 25% (0.25)	37	
38 Add lines 18, 31, 34, and 37	38	161,634.
39 If line 12 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result	39	164,910.
40 Enter the smaller of line 38 or line 39 here and on line 7. If you are filing Form 2555, do not enter this amount on line 7. Instead, enter it on line 4 of the worksheet in the instructions for line 7	40	161,634.

SCHEDULE H
(Form 1040)

Department of the Treasury
Internal Revenue Service

Household Employment Taxes

(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)

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

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **44**

Name of employer

Social security number

Employer identification number

RAFAEL E. MARTINEZ

Calendar year taxpayers having no household employees in 2022 don't have to complete this form for 2022.

A Did you pay **any one** household employee cash wages of \$2,400 or more in 2022? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions before you answer this question.)

☒ **Yes.** Skip lines B and C and go to line 1a.

☐ **No.** Go to line B.

B Did you withhold federal income tax during 2022 for any household employee?

☐ **Yes.** Skip line C and go to line 7.

☐ **No.** Go to line C.

C Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2021 or 2022 to **all** household employees? (**Don't** count cash wages paid in 2021 or 2022 to your spouse, your child under age 21, or your parent.)

☐ **No. Stop.** Don't file this schedule.

☐ **Yes.** Skip lines 1a-9 and go to line 10.

Part I Social Security, Medicare, and Federal Income Taxes

1a	Total cash wages subject to social security tax	1a	8,925.		
b	Qualified sick and family leave wages paid in 2022 for leave taken after March 31, 2020, and before April 1, 2021, included on line 1a	1b			
2a	Social security tax. Multiply line 1a by 12.4% (0.124)	2a		1,107.	
b	Employer share of social security tax on qualified sick and family leave wages paid in 2022 for leave taken after March 31, 2020, and before April 1, 2021. Multiply line 1b by 6.2% (0.062)	2b			
c	Total social security tax. Subtract line 2b from line 2a	2c		1,107.	
3	Total cash wages subject to Medicare tax	3	8,925.		
4	Medicare tax. Multiply line 3 by 2.9% (0.029)	4		259.	
5	Total cash wages subject to Additional Medicare Tax withholding	5			
6	Additional Medicare Tax withholding. Multiply line 5 by 0.9% (0.009)	6			
7	Federal income tax withheld, if any	7			
8a	Total social security, Medicare, and federal income taxes. Add lines 2c, 4, 6, and 7	8a		1,366.	
b	Nonrefundable portion of credit for qualified sick and family leave wages for leave taken before April 1, 2021	8b			
c	Nonrefundable portion of credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021	8c			
d	Total social security, Medicare, and federal income taxes after nonrefundable credits. Add lines 8b and 8c and then subtract that total from line 8a	8d		1,366.	
e	Refundable portion of credit for qualified sick and family leave wages for leave taken before April 1, 2021	8e			
f	Refundable portion of credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021	8f			
g	Qualified sick leave wages for leave taken before April 1, 2021	8g			
h	Qualified health plan expenses allocable to qualified sick leave wages reported on line 8g	8h			
i	Qualified family leave wages for leave taken before April 1, 2021	8i			
j	Qualified health plan expenses allocable to qualified family leave wages reported on line 8i	8j			
k	Qualified sick leave wages for leave taken after March 31, 2021, and before October 1, 2021	8k			
l	Qualified health plan expenses allocable to qualified sick leave wages reported on line 8k	8l			
m	Qualified family leave wages for leave taken after March 31, 2021, and before October 1, 2021	8m			
n	Qualified health plan expenses allocable to qualified family leave wages reported on line 8m	8n			

9 Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2021 or 2022 to **all** household employees?

(**Don't** count cash wages paid in 2021 or 2022 to your spouse, your child under age 21, or your parent.)

☐ **No. Stop.** Include the amount from line 8d above on Schedule 2 (Form 1040), line 9. Include the amounts, if any, from line 8e on Schedule 3 (Form 1040), line 13b, and line 8f on Schedule 3 (Form 1040), line 13h. If you're not required to file Form 1040, see the line 9 instructions.

☒ **Yes.** Go to line 10.

Part II	Federal Unemployment (FUTA) Tax
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Part II Federal Unemployment (FUTA) Tax		Yes	No
10	Did you pay unemployment contributions to only one state? If you paid contributions to a credit reduction state, see instructions and check "No."	X	
11	Did you pay all state unemployment contributions for 2022 by April 18, 2023? Fiscal year filers, see instructions	X	
12	Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?	X	

Next: If you checked the **"Yes"** box on **all** the lines above, complete Section A.
If you checked the **"No"** box on **any** of the lines above, skip Section A and complete Section B.

Section A

13	Name of the state where you paid unemployment contributions	FL		
14	Contributions paid to your state unemployment fund	14	7.	
15	Total cash wages subject to FUTA tax			15 7,000.
16	FUTA tax. Multiply line 15 by 0.6% (0.006). Enter the result here, skip Section B, and go to line 25			16 42

Section B

17 Complete all columns below that apply (if you need more space, see instructions):								
(a) Name of state	(b) Taxable wages (as defined in state act)	(c) State experience rate period		(d) State experience rate	(e) Multiply col. (b) by 0.054	(f) Multiply col. (b) by col. (d)	(g) Subtract col. (f) from col. (e). If zero or less, enter -0-	(h) Contributions paid to state unemployment fund
		From	To					
18 Totals							18	
19 Add columns (g) and (h) of line 18					19			
20 Total cash wages subject to FUTA tax (see the line 15 instructions)						20		
21 Multiply line 20 by 6.0% (0.06)						21		
22 Multiply line 20 by 5.4% (0.054)						22		
23 Enter the smaller of line 19 or line 22. (If you paid state unemployment contributions late or you're in a credit reduction state, see instructions and check here)						☐	23	
24 FUTA tax Subtract line 23 from line 21. Enter the result here and go to line 25						24		

Part III	Total Household Employment Taxes
-----------------	---

25	Enter the amount from line 8d. If you checked the "Yes" box on line C of page 1, enter -0-	25	1,366.
26	Add line 16 (or line 24) and line 25	26	1,408.
27	Are you required to file Form 1040?		

Part IV	Address and Signature - Complete this part only if required. See the line 27 instructions.
----------------	--

City, town or post office, state, and ZIP code		Apt., room, or suite no.	
--	--	--------------------------	--

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Employer's signature		Date	
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date ☐ if self-employed PTIN
	Firm's name		Firm's EIN
	Firm's address		Phone no.

Nondeductible IRAsGo to www.irs.gov/Form8606 for instructions and the latest information.

Attach to 2022 Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file 2022 Form 8606. See instructions.

RAFAEL E. MARTINEZ

Your social security number

Apt. no.

Fill in Your Address
Only if You Are
Filing This Form by
Itself and Not With
Your Tax Return

Home address (number and street, or P.O. box if mail is not delivered to your home)

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below.

Foreign country name

Foreign province/state/county

Foreign postal code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2022.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2022 and you made nondeductible contributions to a traditional IRA in 2022 or an earlier year. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022 and you made nondeductible contributions to a traditional IRA in 2022 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2022, including those made for 2022 from January 1, 2023, through April 18, 2023. See instructions	1	7,000.
2	Enter your total basis in traditional IRAs. See instructions	2	718.
3	Add lines 1 and 2	3	7,718.
In 2022, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? ☐ No Enter the amount from line 3 on line 14. Do not complete the rest of Part I. ☐ Yes Go to line 4.			
4	Enter those contributions included on line 1 that were made from January 1, 2023, through April 18, 2023	4	
5	Subtract line 4 from line 3	5	
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2022, plus any outstanding rollovers. Subtract certain repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instr.)	6	
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2022. Do not include rollovers (other than repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7	
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022. Also, enter this amount on line 16	8	
9	Add lines 6, 7, and 8	9	
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	x
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also, enter this amount on line 17	11	
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2022 and earlier years	14	7,718.
15a	Subtract line 12 from line 7	15a	
b	Enter the amount on line 15a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 18, as applicable (see instructions)	15b	
c	Taxable amount. Subtract line 15b from line 15a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	15c	

Note: You may be subject to an additional 10% tax on the amount on line 15c if you were under age 59 1/2 at the time of the distribution. See instructions.

Part II 2022 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2022.

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022	16
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17
18	Taxable amount. Subtract line 17 from line 16. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	18

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2022. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution (from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2022, including any qualified first-time homebuyer distributions, and any qualified disaster distributions from 2022 Form(s) 8915-F (see instructions)	19
20	Qualified first-time homebuyer expenses (see instructions). Do not enter more than \$10,000 reduced by the total of all your prior qualified first-time homebuyer distributions	20
21	Subtract line 20 from line 19. If zero or less, enter -0-	21
22	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, stop here	22
23	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions)	23
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA. See instructions	24
25 a	Subtract line 24 from line 23. If zero or less, enter -0- and skip lines 25b and 25c	25a
b	Enter the amount on line 25a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 19, as applicable (see instructions)	25b
c	Taxable amount. Subtract line 25b from line 25a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	25c

Sign Here Only if You Are Filing This Form by Itself and Not With Your Tax Return

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

Paid Preparer Use Only	Your signature		Date	
	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed PTIN
	Firm's name	Firm's EIN		
	Firm's address		Phone no.	

Nondeductible IRAsGo to www.irs.gov/Form8606 for instructions and the latest information.

Attach to 2022 Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022Attachment
Sequence No. **48**

Name, if married, file a separate form for each spouse required to file 2022 Form 8606. See instructions.

REBECCA E. MARTINEZ**Fill in Your Address
Only if You Are
Filing This Form by
Itself and Not With
Your Tax Return**

Home address (number and street, or P.O. box if mail is not delivered to your home)

Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below.

Foreign country name

Foreign province/state/county

Foreign postal code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2022.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2022 **and** you made nondeductible contributions to a traditional IRA in 2022 or an earlier year. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022 **and** you made nondeductible contributions to a traditional IRA in 2022 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2022, including those made for 2022 from January 1, 2023, through April 18, 2023. See instructions	1	7,000.
2	Enter your total basis in traditional IRAs. See instructions	2	718.
3	Add lines 1 and 2	3	7,718.
In 2022, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? ☐ No Enter the amount from line 3 on line 14. Do not complete the rest of Part I. ☐ Yes Go to line 4.			
4	Enter those contributions included on line 1 that were made from January 1, 2023, through April 18, 2023	4	
5	Subtract line 4 from line 3	5	
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2022, plus any outstanding rollovers. Subtract certain repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instr.)	6	
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2022. Do not include rollovers (other than repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7	
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022. Also, enter this amount on line 16	8	
9	Add lines 6, 7, and 8	9	
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	x
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also, enter this amount on line 17	11	
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2022 and earlier years	14	7,718.
15a	Subtract line 12 from line 7	15a	
b	Enter the amount on line 15a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 18, as applicable (see instructions)	15b	
c	Taxable amount. Subtract line 15b from line 15a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	15c	
Note: You may be subject to an additional 10% tax on the amount on line 15c if you were under age 59 1/2 at the time of the distribution. See instructions.			

Part II 2022 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2022.

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022	16	
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	
18	Taxable amount. Subtract line 17 from line 16. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	18	

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2022. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution (from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2022, including any qualified first-time homebuyer distributions, and any qualified disaster distributions from 2022 Form(s) 8915-F (see instructions)	19	
20	Qualified first-time homebuyer expenses (see instructions). Do not enter more than \$10,000 reduced by the total of all your prior qualified first-time homebuyer distributions	20	
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	
22	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, stop here	22	
23	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions)	23	
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA. See instructions	24	
25a	Subtract line 24 from line 23. If zero or less, enter -0- and skip lines 25b and 25c	25a	
b	Enter the amount on line 25a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 19, as applicable (see instructions)	25b	
c	Taxable amount. Subtract line 25b from line 25a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	25c	

Sign Here Only if You Are Filing This Form by Itself and Not With Your Tax Return

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

Paid Preparer Use Only	Your signature		Date	Check ☐ if self-employed	PTIN
	Print/type preparer's name	Preparer's signature	Date		
	Firm's name	Firm's EIN			
	Firm's address		Phone no.		

Qualified Business Income Deduction

OMB No. 1545-2994

2022Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on return

Your taxpayer identification number

RAFAEL E. & REBECCA E. MARTINEZ

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

Use this form if your taxable income, before your qualified business income deduction, is above \$170,050 (\$340,100 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

Part I Trade, Business, or Aggregation Information

Complete Schedules A, B, and/or C (Form 8995-A), as applicable, before starting Part I. Attach additional worksheets when needed. See instructions.

1	(a) Trade, business, or aggregation name	(b) Check if specified service	(c) Check if aggregation	(d) Taxpayer identification number	(e) Check if patron
A		☐	☐		☐
B		☐	☐		☐
C		☐	☐		☐

Part II Determine Your Adjusted Qualified Business Income

	A	B	C
2 Qualified business income from the trade, business, or aggregation. See instructions	2		
3 Multiply line 2 by 20% (0.20). If your taxable income is \$170,500 or less (\$340,100 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	3		
4 Allocable share of W-2 wages from the trade, business, or aggregation	4		
5 Multiply line 4 by 50% (0.50)	5		
6 Multiply line 4 by 25% (0.25)	6		
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	7		
8 Multiply line 7 by 2.5% (0.025)	8		
9 Add lines 6 and 8	9		
10 Enter the greater of line 5 or line 9	10		
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	11		
12 Phased-in reduction. Enter the amount from line 26, if any	12		
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	13		
14 Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions	14		
15 Qualified business income component. Subtract line 14 from line 13	15		
16 Total qualified business income component. Add all amounts reported on line 15	16		

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

Form **8995-A** (2022)

Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$170,050 but not \$220,050 (\$340,100 and \$440,100 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

		A	B	C
17	Enter the amounts from line 3	17		
18	Enter the amounts from line 10	18		
19	Subtract line 18 from line 17	19		
20	Taxable income before qualified business income deduction	20		
21	Threshold. Enter \$170,050 (\$340,100 if married filing jointly)	21		
22	Subtract line 21 from line 20	22		
23	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	23		
24	Phase-in percentage. Divide line 22 by line 23	24		
25	Total phase-in reduction. Multiply line 19 by line 24	25		
26	Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business	26		

Part IV Determine Your Qualified Business Income Deduction

27	Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16	27		
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions SEE STATEMENT 22	28	130.	
29	Qualified REIT dividends and PTP (loss) carryforward from prior years	29	()	
30	Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0-	30	130.	
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	26.	
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		26.
33	Taxable income before qualified business income deduction	33	711,427.	
34	Net capital gain. See instructions	34	40,948.	
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		670,479.
36	Income limitation. Multiply line 35 by 20% (0.20)	36		134,096.
37	Qualified business income deduction before the domestic production activities deduction (DPAD) under section 199A(g). Enter the smaller of line 32 or line 36	37		26.
38	DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don't enter more than line 33 minus line 37	38		
39	Total qualified business income deduction. Add lines 37 and 38	39		26.
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40		()

SCHEDULE C
(Form 8995-A)(Rev. December 2022)
Department of the Treasury
Internal Revenue Service**Loss Netting and Carryforward**

Attach to Form 8995-A.

Go to www.irs.gov/Form8995A for instructions and the latest information.

OMB No. 1545-2294

Attachment
Sequence No. **55D**

Name(s) shown on return

Your taxpayer identification number

RAFAEL E. & REBECCA E. MARTINEZ

If you have more than three trades, businesses, or aggregations, complete and attach as many Schedules C as needed. See instructions.

1	Trade, business, or aggregation name	(a) Qualified business income/(loss)	(b) Reduction for loss netting (see instructions)	(c) Adjusted qualified business income (Combine (a) and (b). If zero or less, enter -0-.)
	SEE STATEMENT 23		()	
			()	
			()	
2	Qualified business net (loss) carryforward from prior years. See instructions		2	()
3	Total of the trades, businesses, or aggregations losses. Combine the negative amounts on lines 1, column (a), and 2 for all trades, businesses, or aggregations		3	(32,267)
4	Total of the trades, businesses, or aggregations income. Add the positive amounts on line 1, column (a), for all trades, businesses, or aggregations		4	1,867.
5	Losses netted with income of other trades, businesses, or aggregations. Enter in the parentheses on line 5 the smaller of the absolute value of line 3 or line 4. Allocate this amount to each of the trades, businesses, or aggregations on line 1, column (b).		5	(1,867)
6	Qualified business net (loss) carryforward. Subtract line 5 from line 3. If zero or more, enter -0-		6	(30,400)

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

Schedule C (Form 8995-A) (Rev. 12-2022)

Additional Medicare Tax

OMB No. 1545-0074

2022Department of the Treasury
Internal Revenue Service

If any line does not apply to you, leave it blank. See separate instructions.

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

Go to www.irs.gov/Form8959 for instructions and the latest information.Attachment
Sequence No. **71**

Name(s) shown on return

RAFAEL E. & REBECCA E. MARTINEZ

Your

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	289,000.	
2	Unreported tips from Form 4137, line 6	2		
3	Wages from Form 8919, line 6	3		
4	Add lines 1 through 3	4	289,000.	
5	Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying surviving spouse \$200,000	5	250,000.	
6	Subtract line 5 from line 4. If zero or less, enter -0-	6		39,000.
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II	7		351.

Part II Additional Medicare Tax on Self-Employment Income

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

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

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

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-PR or 1040-SS filers, see instructions), and go to Part V	18		351.
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Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	4,992.	
20	Enter the amount from line 1	20	289,000.	
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	4,191.	
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		801.
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-PR or 1040-SS filers, see instructions)	24		801.

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

OMB No 1545-2227

2022Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on your tax return

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number or EIN

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	1,582.
2	Ordinary dividends (see instructions)	2	27,228.
3	Annuities (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a	490,755.
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions) STATEMENT 24	4b	-491,802.
c	Combine lines 4a and 4b	4c	-1,047.
5a	Net gain or loss from disposition of property (see instructions)	5a	23,991.
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	23,991.
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	51,754.

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	51,754.
Individuals:			
13	Modified adjusted gross income (see instructions)	13	847,501.
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	597,501.
16	Enter the smaller of line 12 or line 15	16	51,754.
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	1,967.
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	

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

Form **8960** (2022)

[illegible]

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total					

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Total		32,331.	1.000000000	29,417

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
Total		32,331.	29,417.	2,914

ALTERNATIVE MINIMUM TAX

Passive Activity Loss Limitations

**See separate instructions.
Attach to Form 1040, 1040-SR, or 1041.
Go to www.irs.gov/Form8582 for instructions and the latest information.**

OMB No. 1545-1008

2022

Attachment
Sequence No. **858**

Name(s) shown on return

Identifying number

RAFAEL E. & REBECCA E. MARTINEZ

Part I 2022 Passive Activity Loss

Caution: Complete Parts IV and V before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation, see *Special Allowance for Rental Real Estate Activities* in the instructions.)

1a Activities with net income (enter the amount from Part IV, column (a))	1a	_____
b Activities with net loss (enter the amount from Part IV, column (b))	1b	(_____)
c Prior years' unallowed losses (enter the amount from Part IV, column (c))	1c	(_____)
d Combine lines 1a, 1b, and 1c		_____

1d

All Other Passive Activities

2a Activities with net income (enter the amount from Part V, column (a))	2a	2,914
b Activities with net loss (enter the amount from Part V, column (b))	2b	(32,331)
c Prior years' unallowed losses (enter the amount from Part V, column (c))	2c	(
d Combine lines 2a , 2b , and 2c		

2d

-29,417.

3 Combine lines 1d and 2d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c or 2c. Report the losses on the forms and schedules normally used.

3

-29,417.

- If line 3 is a loss and:
- Line 1d is a loss, go to Part II.
 - Line 2d is a loss (and line 1d is zero or more), skip Part II and go to line 10.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, **do not** complete Part II. Instead, go to line 10.

Part II Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

4	Enter the smaller of the loss on line 1d or the loss on line 3	
5	Enter \$150,000. If married filing separately, see instructions	5
6	Enter modified adjusted gross income, but not less than zero. See instructions	6
Note: If line 6 is greater than or equal to line 5, skip lines 7 and 8 and enter -0- on line 9. Otherwise, go to line 7.		
7	Subtract line 6 from line 5	7
8	Multiply line 7 by 50% (0.50). Do not enter more than \$25,000. If married filing separately, see instructions	
9	Enter the smaller of line 4 or line 8	

4

8

9

Part II Total Losses Allowed

10	Add the income, if any, on lines 1a and 2a and enter the total	10	2,914.
11	Total losses allowed from all passive activities for 2022. Add lines 9 and 10. See instructions to find out how to report the losses on your tax return	11	2,914.

10

2.914.

11

2,914.

Part IV Complete This Part Before Part I, Lines 1a, 1b, and 1c. See instructions.

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
Total. Enter on Part I, lines 1a, 1b, and 1c					

Total. Enter on Part I, lines 1a, 1b, and 1c ...

LHA For Paperwork Reduction Act Notice, see instructions.

Form 8582 (2022)

ALTERNATIVE MINIMUM TAX

Form 8582 (2022) **RAFAEL E. & REBECCA E. MARTINEZ**

Page **2**

Part V Complete This Part Before Part I, Lines 2a, 2b, and 2c. See instructions.

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 2a)	(b) Net loss (line 2b)	(c) Unallowed loss (line 2c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR PART V					
Total. Enter on Part I, lines 2a, 2b, and 2c ...	2,914.	-32,331.			

Part VI Use This Part if an Amount Is Shown on Part II, Line 9. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total					

Part VII Allocation of Unallowed Losses. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
SEE ATTACHED STATEMENT FOR PART VII				
Total		32,331.	1.000000000	29,417.

Part VIII Allowed Losses. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
SEE ATTACHED STATEMENT FOR PART VIII				
Total		32,331.	29,417.	2,914.

Form 8582 (2022)

Noncash Charitable ContributionsAttach one or more Forms 8283 to your tax return if you claimed a total deduction
of over \$500 for all contributed property.Go to www.irs.gov/Form8283 for instructions and the latest information.

Name(s) shown on your income tax return

Identifying number

RAFAEL E. & REBECCA E. MARTINEZ**Note:** Figure the amount of your contribution deduction before completing this form. See your tax return instructions.**Section A. Donated Property of \$5,000 or Less and Publicly Traded Securities** - List in this section only an item

(or a group of similar items) for which you claimed a deduction of \$5,000 or less. Also list publicly traded securities and certain other property even if the deduction is more than \$5,000. See instructions.

Part I Information on Donated Property - If you need more space, attach a statement.

1	(a) Name and address of the donee organization	(b) If donated property is a vehicle, check the box. Also enter the vehicle identification number (unless Form 1098-C is attached)	(c) Description and condition of donated property (For a vehicle, enter the year, make, model, and mileage. For securities and other property, see instructions.)
A	THE GENEVA SCHOOL INC 2025 ST, WINTER PARK, FL 32792	☐	ITEMS TO BE AUCTIONED; LIQUOR & BLANKETS
B	NATIONAL CHRISTIAN FOUNDATION 15 NORTH EO, ORLANDO, FL 32801	☐	921 SH AMER NEW PERSPECTIVE FUND CLF-2
C	NATIONAL CHRISTIAN FOUNDATION 15 NORTH EO, ORLANDO, FL 32801	☐	142 SH ISHARES S&P SMALL CAP 600 INDEX FUND
D	NATIONAL CHRISTIAN FOUNDATION 15 NORTH EO, ORLANDO, FL 32801	☐	196SH TRUIST, 35SH WASH MUTUAL, 891.725SH AMER MU
E		☐	

Note: If the amount you claimed as a deduction for an item is \$500 or less, you do not have to complete columns (e), (f), and (g).

	(d) Date of the contribution	(e) Date acquired by donor (mo., yr.)	(f) How acquired by donor	(g) Donor's cost or adjusted basis	(h) Fair market value (see instructions)	(i) Method used to determine the fair market value
A	03/26/22	03/22	PURCHASE	451.	451.	NEWLY PURCHASED PRICE
B	03/18/22	VAR.	PURCHASE			NYSE
C	12/22/22	VAR.	PURCHASE			NYSE
D	12/28/22	VAR.	PURCHASE			NYSE
E						

Section B. Donated Property Over \$5,000 (Except Publicly Traded Securities, Vehicles, Intellectual Property or Inventory Reportable

in Section A) - Complete this section for one item (or a group of similar items) for which you claimed a deduction of more than \$5,000 per item or group (except contributions reportable in Section A). Provide a separate form for each item donated unless it is part of a group of similar items. A qualified appraisal is generally required for items reportable in Section B. See instructions.

Part I Information on Donated Property

2 Check the box that describes the type of property donated.

- | | | |
|--|--|---|
| a ☐ Art* (contribution of \$20,000 or more) | e ☐ Other Real Estate | i ☐ Vehicles |
| b ☐ Qualified Conservation Contribution | f ☐ Securities | j ☐ Clothing and household items |
| c ☐ Equipment | g ☐ Collectibles** | k ☐ Other |
| d ☐ Art* (contribution of less than \$20,000) | h ☐ Intellectual Property | |

*Art includes paintings, sculptures, watercolors, prints, drawings, ceramics, antiques, decorative arts, textiles, carpets, silver, rare manuscripts, historical memorabilia, and other similar objects.

**Collectibles include coins, stamps, books, gems, jewelry, sports memorabilia, dolls, etc., but not art as defined above.

Note: In certain cases, you must attach a qualified appraisal of the property. See instructions.

3								(a) Description of donated property (if you need more space, attach a separate statement)		(b) If any tangible personal property or real property was donated, give a brief summary of the overall physical condition of the property at the time of the gift		(c) Appraised fair market value	
A													
B													
C													
		(d) Date acquired by donor (mo., yr.)		(e) How acquired by donor		(f) Donor's cost or adjusted basis		(g) For bargain sales, enter amount received		(h) Amount claimed as a deduction (see instructions)		(i) Date of contribution (see instructions)	
A													
B													
C													

**S Corporation Shareholder Stock and
Debt Basis Limitations**

Attach to your tax return.

Go to www.irs.gov/Form7203 for instructions and the latest information.

OMB No. 1545-2302

Attachment
Sequence No. **203**Name of shareholder **RAFAEL E. MARTINEZ** Identifying number **[REDACTED]**A Name of S corporation **MCEWAN, MARTINEZ., DUKES & HALL P.A.** B Employer identification number **[REDACTED]**

C Stock block (see instructions):

D Check applicable box(es) to indicate how stock was acquired:

(1) ☐ Original shareholder (2) ☐ Purchased (3) ☐ Inherited (4) ☐ Gift (5) ☐ Other:E Check if you have a Regulations section 1.1367-1(g) election in effect during the tax year for this S corporation ☐**Part I Shareholder Stock Basis**

1	Stock basis at the beginning of the corporation's tax year	1	103,514.
2	Basis from any capital contributions made or additional stock acquired during the tax year	2	
3a	Ordinary business income (enter losses in Part III)	3a	423,046.
b	Net rental real estate income (enter losses in Part III)	3b	
c	Other net rental income (enter losses in Part III)	3c	
d	Interest income	3d	253.
e	Ordinary dividends	3e	
f	Royalties	3f	
g	Net capital gains (enter losses in Part III)	3g	
h	Net section 1231 gain (enter losses in Part III)	3h	
i	Other income (enter losses in Part III)	3i	
j	Excess depletion adjustment	3j	
k	Tax-exempt income	3k	
l	Recapture of business credits	3l	
m	Other items that increase stock basis	3m	
4	Add lines 3a through 3m	4	423,299.
5	Stock basis before distributions. Add lines 1, 2, and 4	5	526,813.
6	Distributions (excluding dividend distributions)	6	345,926.
Note: If line 6 is larger than line 5, subtract line 5 from line 6 and report the result as a capital gain on Form 8949 and Schedule D. See instructions.			
7	Stock basis after distributions. Subtract line 6 from line 5. If the result is zero or less, enter -0-, skip lines 8 through 14, and enter -0- on line 15	7	180,887.
8a	Nondeductible expenses	8a	35,403.
b	Depletion for oil and gas	8b	
c	Business credits (sections 50(c)(1) and (5))	8c	
9	Add lines 8a through 8c	9	35,403.
10	Stock basis before loss and deduction items. Subtract line 9 from line 7. If the result is zero or less, enter -0-, skip lines 11 through 14, and enter -0- on line 15	10	145,484.
11	Allowable loss and deduction items. Enter the amount from line 47, column (c)	11	453.
12	Debt basis restoration (see net increase in instructions for line 23)	12	
13	Other items that decrease stock basis	13	
14	Add lines 11, 12, and 13	14	453.
15	Stock basis at the end of the corporation's tax year. Subtract line 14 from line 10. If the result is zero or less, enter -0-	15	145,031.

Part II Shareholder Debt Basis**Section A - Amount of Debt** (If more than three debts, see instructions.)

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	
16 Loan balance at the beginning of the corporation's tax year				
17 Additional loans (see instructions)				
18 Loan balance before repayment. Add lines 16 and 17				
19 Principal portion of debt repayment (this line doesn't include interest)	()	()	()	()
20 Loan balance at the end of the corporation's tax year. Subtract line 19 from line 18				

Part II Shareholder Debt Basis (continued)**Section B - Adjustments to Debt Basis**

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
21 Debt basis at the beginning of the corporation's tax year				
22 Enter the amount, if any, from line 17				
23 Debt basis restoration (see instructions)				
24 Debt basis before repayment. Add lines 21, 22, and 23				
25 Divide line 24 by line 18				
26 Nontaxable debt repayment. Multiply line 25 by line 19				
27 Debt basis before nondeductible expenses and losses. Subtract line 26 from line 24				
28 Nondeductible expenses and oil and gas depletion deductions in excess of stock basis				
29 Debt basis before losses and deductions. Subtract line 28 from line 27. If the result is zero or less, enter -0-				
30 Allowable losses in excess of stock basis. Enter the amount from line 47, column (d)				
31 Debt basis at the end of the corporation's tax year. Subtract line 30 from line 29. If the result is zero or less, enter -0-				

Section C - Gain on Loan Repayment

32 Repayment. Enter the amount from line 19				
33 Nontaxable repayments. Enter the amount from line 26				
34 Reportable gain. Subtract line 33 from line 32				

Part III Shareholder Allowable Loss and Deduction Items

Description	(a) Current year losses and deductions	(b) Carryover amounts (column (e)) from the previous year	(c) Allowable loss from stock basis	(d) Allowable loss from debt basis	(e) Carryover amounts
35 Ordinary business loss					
36 Net rental real estate loss					
37 Other net rental loss					
38 Net capital loss					
39 Net section 1231 loss					
40 Other loss					
41 Section 179 deductions					
42 Charitable contributions	453.		453.		
43 Investment interest expense					
44 Section 59(e)(2) expenditures					
45 Other deductions					
46 Foreign taxes paid or accrued					
47 Total loss. Add lines 35 through 46 for each column. Enter the total loss in column (c) on line 11 and enter the total loss in column (d) on line 30	453.		453.		

ALTERNATIVE MINIMUM TAX
S Corporation Shareholder Stock and
Debt Basis Limitations

Attach to your tax return.

Go to www.irs.gov/Form7203 for instructions and the latest information.

OMB No. 1545-2302

Attachment
Sequence No. 203

Name of shareholder RAFAEL E. MARTINEZ		Identifying number [REDACTED]
A Name of S corporation MCEWAN, MARTINEZ., DUKES & HALL P.A.		B Employer identification number [REDACTED]
C Stock block (see instructions):		
D Check applicable box(es) to indicate how stock was acquired: (1) ☐ Original shareholder (2) ☐ Purchased (3) ☐ Inherited (4) ☐ Gift (5) ☐ Other:		
E Check if you have a Regulations section 1.1367-1(g) election in effect during the tax year for this S corporation ☐		

Part I Shareholder Stock Basis

1	Stock basis at the beginning of the corporation's tax year	1	103,514.
2	Basis from any capital contributions made or additional stock acquired during the tax year	2	
3a	Ordinary business income (enter losses in Part III)	3a	423,046.
b	Net rental real estate income (enter losses in Part III)	3b	
c	Other net rental income (enter losses in Part III)	3c	
d	Interest income	3d	253.
e	Ordinary dividends	3e	
f	Royalties	3f	
g	Net capital gains (enter losses in Part III)	3g	
h	Net section 1231 gain (enter losses in Part III)	3h	
i	Other income (enter losses in Part III)	3i	
j	Excess depletion adjustment	3j	
k	Tax-exempt income	3k	
l	Recapture of business credits	3l	
m	Other items that increase stock basis	3m	
4	Add lines 3a through 3m	4	423,299.
5	Stock basis before distributions. Add lines 1, 2, and 4	5	526,813.
6	Distributions (excluding dividend distributions) Note: If line 6 is larger than line 5, subtract line 5 from line 6 and report the result as a capital gain on Form 8949 and Schedule D. See instructions.	6	345,926.
7	Stock basis after distributions. Subtract line 6 from line 5. If the result is zero or less, enter -0-, skip lines 8 through 14, and enter -0- on line 15	7	180,887.
8a	Non deductible expenses	8a	35,403.
b	Depletion for oil and gas	8b	
c	Business credits (sections 50(c)(1) and (5))	8c	
9	Add lines 8a through 8c	9	35,403.
10	Stock basis before loss and deduction items. Subtract line 9 from line 7. If the result is zero or less, enter -0-, skip lines 11 through 14, and enter -0- on line 15	10	145,484.
11	Allowable loss and deduction items. Enter the amount from line 47, column (c)	11	453.
12	Debt basis restoration (see net increase in instructions for line 23)	12	
13	Other items that decrease stock basis	13	
14	Add lines 11, 12, and 13	14	453.
15	Stock basis at the end of the corporation's tax year. Subtract line 14 from line 10. If the result is zero or less, enter -0-	15	145,031.

Part II Shareholder Debt Basis**Section A - Amount of Debt** (If more than three debts, see instructions.)

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	
16 Loan balance at the beginning of the corporation's tax year				
17 Additional loans (see instructions)				
18 Loan balance before repayment. Add lines 16 and 17				
19 Principal portion of debt repayment (this line doesn't include interest)	()	()	()	()
20 Loan balance at the end of the corporation's tax year. Subtract line 19 from line 18				

Part II Shareholder Debt Basis (continued)**Section B - Adjustments to Debt Basis**

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
21 Debt basis at the beginning of the corporation's tax year				
22 Enter the amount, if any, from line 17				
23 Debt basis restoration (see instructions)				
24 Debt basis before repayment. Add lines 21, 22, and 23				
25 Divide line 24 by line 18				
26 Nontaxable debt repayment. Multiply line 25 by line 19				
27 Debt basis before nondeductible expenses and losses. Subtract line 26 from line 24				
28 Nondeductible expenses and oil and gas depletion deductions in excess of stock basis				
29 Debt basis before losses and deductions. Subtract line 28 from line 27. If the result is zero or less, enter -0-				
30 Allowable losses in excess of stock basis. Enter the amount from line 47, column (d)				
31 Debt basis at the end of the corporation's tax year. Subtract line 30 from line 29. If the result is zero or less, enter -0-				

Section C - Gain on Loan Repayment

32 Repayment. Enter the amount from line 19				
33 Nontaxable repayments. Enter the amount from line 26				
34 Reportable gain. Subtract line 33 from line 32				

Part III Shareholder Allowable Loss and Deduction Items

Description	(a) Current year losses and deductions	(b) Carryover amounts (column (e)) from the previous year	(c) Allowable loss from stock basis	(d) Allowable loss from debt basis	(e) Carryover amounts
35 Ordinary business loss					
36 Net rental real estate loss					
37 Other net rental loss					
38 Net capital loss					
39 Net section 1231 loss					
40 Other loss					
41 Section 179 deductions					
42 Charitable contributions	453.		453.		
43 Investment interest expense					
44 Section 59(e)(2) expenditures					
45 Other deductions					
46 Foreign taxes paid or accrued					
47 Total loss. Add lines 35 through 46 for each column. Enter the total loss in column (c) on line 11 and enter the total loss in column (d) on line 30	453.		453.		

INDIVIDUAL RETIREMENT ACCOUNT COMPUTATION FOR FEDERAL 1040

Name: RAFAEL E. MARTINEZ

SSN: [REDACTED]

Traditional IRA Deduction Computation

Covered by an employer retirement plan? ☒ Yes ☐ No

1	Traditional IRA limitation	7,000.	
2	Less: Amount contributed to Roth IRA	0.	
3	Net traditional IRA amount		7,000.
4	Wages and other earned income after Keogh deduction	281,801.	
5	Enter foreign housing and earned income exclusion		
6	Net compensation (line 4 minus line 5)		281,801.
7	Amount contributed to traditional IRA		7,000.
8	Allowable contribution (lesser of line 3, line 6 or line 7)		7,000.
9	Contribution credit:		
a	IRA limitation		
b	IRA contributions from line 7		
c	Contribution credit, line 9a minus line 9b		
d	Prior year excess contribution not previously eliminated		
e	Additional allowable contribution (lesser of line 9c or line 9d)		
10	Total allowable contribution, line 8 plus line 9e		7,000.
11	Excess Contribution		
12	Limitation Reduction:		
a	Traditional IRA limitation	7,000.	
b	Adjusted gross income before traditional IRA deduction	847,501.	
c	Phaseout level	109,000.	
d	Excess AGI, line 12b minus line 12c	738,501.	
e	Reduction ratio, line 12d divided by \$10,000 or \$20,000	100.00%	
f	Amount of limitation reduction, line 12a times line 12e (round down to previous \$10)	7,000.	
g	Reduced limitation, line 12a minus line 12f. Not less than \$200 if ratio under 100%		0.
13	Traditional IRA deduction, lesser of line 10 or line 12g		0.

Roth IRA Contribution Computation

1	Roth IRA limitation		
2	Amount contributed to traditional IRA		
3	Net Roth IRA limitation		
4	Wages and other earned income after Keogh deduction and foreign earned income exclusion		
5	Amount contributed to Roth IRA		
6	Allowable Roth IRA contribution before AGI limitation (lesser of line 3, 4 or 5)		
7	Limitation Reduction:		
a	Modified AGI for Roth IRA purposes		
b	Phaseout level		
c	Excess AGI, line 7a minus line 7b		
d	Reduction ratio, line 7c divided by \$10,000 or \$15,000		
e	Amount of limitation reduction, line 1 times line 7d (round down to previous \$10)		
8	Roth IRA contribution (lesser of line 1 minus line 7e or line 6). Not less than \$200 if ratio under 100%		

INDIVIDUAL RETIREMENT ACCOUNT COMPUTATION FOR FEDERAL 1040

Name: REBECCA E. MARTINEZ

SSN:

Traditional IRA Deduction Computation

Covered by an employer retirement plan?

☐ Yes ☒ No

1	Traditional IRA limitation	7,000.	
2	Less: Amount contributed to Roth IRA	0.	
3	Net traditional IRA amount		7,000.
4	Wages and other earned income after Keogh deduction	281,801.	
5	Enter foreign housing and earned income exclusion		
6	Net compensation (line 4 minus line 5)		281,801.
7	Amount contributed to traditional IRA		7,000.
8	Allowable contribution (lesser of line 3, line 6 or line 7)		7,000.
9	Contribution credit:		
a	IRA limitation		
b	IRA contributions from line 7		
c	Contribution credit, line 9a minus line 9b		
d	Prior year excess contribution not previously eliminated		
e	Additional allowable contribution (lesser of line 9c or line 9d)		
10	Total allowable contribution, line 8 plus line 9e		7,000.
11	Excess Contribution		
12	Limitation Reduction:		
a	Traditional IRA limitation	7,000.	
b	Adjusted gross income before traditional IRA deduction	847,501.	
c	Phaseout level	204,000.	
d	Excess AGI, line 12b minus line 12c	643,501.	
e	Reduction ratio, line 12d divided by \$10,000 or \$20,000	100.00%	
f	Amount of limitation reduction, line 12a times line 12e (round down to previous \$10)	7,000.	
g	Reduced limitation, line 12a minus line 12f. Not less than \$200 if ratio under 100%		0.
13	Traditional IRA deduction, lesser of line 10 or line 12g		0.

Roth IRA Contribution Computation

1	Roth IRA limitation		
2	Amount contributed to traditional IRA		
3	Net Roth IRA limitation		
4	Wages and other earned income after Keogh deduction and foreign earned income exclusion		
5	Amount contributed to Roth IRA		
6	Allowable Roth IRA contribution before AGI limitation (lesser of line 3, 4 or 5)		
7	Limitation Reduction:		
a	Modified AGI for Roth IRA purposes		
b	Phaseout level		
c	Excess AGI, line 7a minus line 7b		
d	Reduction ratio, line 7c divided by \$10,000 or \$15,000		
e	Amount of limitation reduction, line 1 times line 7d (round down to previous \$10)		
8	Roth IRA contribution (lesser of line 1 minus line 7e or line 6). Not less than \$200 if ratio under 100%		

IRA - Modified AGI for Computing Traditional IRA Deduction

1. Adjusted gross income (AGI) from Form 1040 (not taking into account any social security benefits, any deduction for contributions to a traditional IRA, any student loan interest deduction, or any exclusion of interest from savings bonds to be reported on Form 8815)	805,556.
2. Fifty percent of all social security benefits received	24,674.
3. Total of any foreign earned income exclusion, foreign housing exclusion, U.S. possessions income exclusion, exclusion of income from Puerto Rico claimed as a bona fide resident of Puerto Rico, or exclusion of employer-provided adoption benefits	
4. Total amount of any tax-exempt interest reported on line 2a of Form 1040	3,893.
5. Total of lines 1, 2, 3, and 4	834,123.
6. Base amount listed below for your filing status	32,000.
* \$25,000 if single, head of household, surviving spouse, or married filing separately and lived apart from spouse during the entire year; * \$32,000 if married filing jointly; * \$-0- if married filing separately and lived with spouse at any time during the year	
7. Line 5 minus line 6. If zero or less, enter zero	802,123.
8. 50% of the amount between \$25,000 and \$34,000 (\$32,000 and \$44,000 if MFJ; \$0 if MFS and you lived with spouse at any time during the year). Limited to line 2 above	6,000.
9. 85% of the amount over \$34,000 (\$44,000 if MFJ; \$0 if MFS and lived with spouse at any time during the year).	671,605.
10. 85% of all social security benefits received	41,945.
11. Taxable social security benefits to be included in modified AGI for traditional IRA deduction purposes. Enter the lesser of line 8 plus line 9 or line 10. Plus any lump sum payments	41,945.
12. Enter the amount of any employer-provided adoption benefits exclusion and any foreign earned income exclusion and foreign housing exclusion or deduction claimed	
13. Modified AGI for determining reduced Traditional IRA deduction - add lines 1, 11 and 12	847,501.

Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership

(Keep for your records.)

Name of Entity: **MCEWAN-EDWARDS BUILDING, LLC**

EIN: [REDACTED]

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.

Enter -0- if this is your first tax year 1. 236,578.

Increases:

2. Money and your adjusted basis in property contributed to the partnership less the associated liabilities (but not less than zero) 2. _____

3. Your increased share of or assumption of partnership liabilities (Subtract your share of liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership liabilities you assumed during the tax year) (but not less than zero) 3. _____

4. Your share of the partnership's income or gain (including tax-exempt income) reduced by any amount included in interest income with respect to the credit to holders of clean renewable energy bonds 4. 78,378.

5. Any gain recognized this year on contributions of property. Do not include gain from transfer of liabilities 5. _____

6. Your share of the excess of the deductions for depletion (other than oil and gas depletion) over the basis of the property subject to depletion 6. _____

Decreases:

7. Withdrawals and distributions of money and the adjusted basis of property distributed to you from the partnership. Do not include the amount of property distributions included in the partner's income (taxable income) 7. -82,578.

Caution: A distribution may be taxable if the amount exceeds your adjusted basis of your partnership interest immediately before the distribution.

8. Your decreased share of partnership liabilities and any decrease in your individual liabilities because they were assumed by the partnership. (Subtract your share of liabilities shown in Item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021 Schedule K-1 and add the amount of your individual liabilities that the partnership assumed during the tax year (but not less than zero)) 8. _____

9. Your share of the partnership's nondeductible expenses that are not capital expenditures 9. _____

10. Your share of the partnership's losses and deductions (including capital losses). However, include your share of the partnership's section 179 expense deduction for this year even if you cannot deduct all of it because of limitations 10. 9,589.

11. The amount of your deduction for depletion of any partnership oil and gas property, not to exceed your allocable share of the adjusted basis of that property 11. _____

12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6 and subtract lines 7 through 11 from the total. If zero or less, enter -0-) 12. 387,945.

Caution: The deduction for your share of the partnership's losses and deductions is limited to your adjusted basis in your partnership interest. If you entered zero on line 12 and the amount figured for line 12 was less than zero, a portion of your share of the partnership losses and deductions may not be deductible.

Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership

(Keep for your records.)

Name of Entity: CSE OPORTUNITY FUND II LLC

EIN: [REDACTED]

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.

Enter -0- if this is your first tax year

1. 92,643.

Increases:

2. Money and your adjusted basis in property contributed to the partnership less the associated liabilities (but not less than zero)

2. _____

3. Your increased share of or assumption of partnership liabilities (Subtract your share of liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership liabilities you assumed during the tax year) (but not less than zero)

3. _____

4. Your share of the partnership's income or gain (including tax-exempt income) reduced by any amount included in interest income with respect to the credit to holders of clean renewable energy bonds

4. 2,914.

5. Any gain recognized this year on contributions of property. Do not include gain from transfer of liabilities

5. _____

6. Your share of the excess of the deductions for depletion (other than oil and gas depletion) over the basis of the property subject to depletion

6. _____

Decreases:

7. Withdrawals and distributions of money and the adjusted basis of property distributed to you from the partnership. Do not include the amount of property distributions included in the partner's income (taxable income)

7. 33,673.

Caution: A distribution may be taxable if the amount exceeds your adjusted basis of your partnership interest immediately before the distribution.

8. Your decreased share of partnership liabilities and any decrease in your individual liabilities because they were assumed by the partnership. (Subtract your share of liabilities shown in item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021 Schedule K-1 and add the amount of your individual liabilities that the partnership assumed during the tax year (but not less than zero))

8. _____

9. Your share of the partnership's nondeductible expenses that are not capital expenditures

9. _____

10. Your share of the partnership's losses and deductions (including capital losses). However, include your share of the partnership's section 179 expense deduction for this year even if you cannot deduct all of it because of limitations

10. _____

11. The amount of your deduction for depletion of any partnership oil and gas property, not to exceed your allocable share of the adjusted basis of that property

11. _____

12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6 and subtract lines 7 through 11 from the total. If zero or less, enter -0-.)

12. 61,884.

Caution: The deduction for your share of the partnership's losses and deductions is limited to your adjusted basis in your partnership interest. If you entered zero on line 12 and the amount figured for line 12 was less than zero, a portion of your share of the partnership losses and deductions may not be deductible.

ALTERNATIVE MINIMUM TAX
Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership
(Keep for your records.)

Name of Entity: **MCEWAN-EDWARDS BUILDING, LLC**

EIN: XXXXXXXXXX

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.
Enter -0- if this is your first tax year 1. 236,578.
- Increases:
2. Money and your adjusted basis in property contributed to the partnership less
the associated liabilities (but not less than zero) 2. 0.
3. Your increased share of or assumption of partnership liabilities (Subtract your share of
liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities
shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership
liabilities you assumed during the tax year) (but not less than zero) 3. _____
4. Your share of the partnership's income or gain (including tax-exempt income) reduced by
any amount included in interest income with respect to the credit to holders of clean renewable
energy bonds 4. 78,378.
5. Any gain recognized this year on contributions of property. Do not include gain from
transfer of liabilities 5. 0.
6. Your share of the excess of the deductions for depletion (other than oil and gas
depletion) over the basis of the property subject to depletion 6. _____
- Decreases:
7. Withdrawals and distributions of money and the adjusted basis of property distributed
to you from the partnership. Do not include the amount of property distributions
included in the partner's income (taxable income) 7. -82,578.
- Caution:** A distribution may be taxable if the amount exceeds your adjusted basis of
your partnership interest immediately before the distribution.
8. Your decreased share of partnership liabilities and any decrease in your individual liabilities
because they were assumed by the partnership. (Subtract your share of liabilities shown in
item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021
Schedule K-1 and add the amount of your individual liabilities that the partnership assumed
during the tax year) (but not less than zero) 8. _____
9. Your share of the partnership's nondeductible expenses that are not capital
expenditures 9. _____
10. Your share of the partnership's losses and deductions (including capital losses).
However, include your share of the partnership's section 179 expense deduction for
this year even if you cannot deduct all of it because of limitations 10. 9,734.
11. The amount of your deduction for depletion of any partnership oil and gas property,
not to exceed your allocable share of the adjusted basis of that property 11. _____
12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6
and subtract lines 7 through 11 from the total. If zero or less, enter -0-.) 12. 387,800.

Caution: The deduction for your share of the partnership's losses and deductions is
limited to your adjusted basis in your partnership interest. If you entered zero on line 12
and the amount figured for line 12 was less than zero, a portion of your share of the
partnership losses and deductions may not be deductible.

ALTERNATIVE MINIMUM TAX
Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership
(Keep for your records.)

Name of Entity: **CSE OPORTUNITY FUND II LLC**

EIN: XXXXXXXXXX

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.
Enter -0- if this is your first tax year 1. 92,643.
- Increases:
2. Money and your adjusted basis in property contributed to the partnership less
the associated liabilities (but not less than zero) 2. 0.
3. Your increased share of or assumption of partnership liabilities (Subtract your share of
liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities
shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership
liabilities you assumed during the tax year) (but not less than zero) 3. _____
4. Your share of the partnership's income or gain (including tax-exempt income) reduced by
any amount included in interest income with respect to the credit to holders of clean renewable
energy bonds 4. 2,914.
5. Any gain recognized this year on contributions of property. Do not include gain from
transfer of liabilities 5. 0.
6. Your share of the excess of the deductions for depletion (other than oil and gas
depletion) over the basis of the property subject to depletion 6. _____
- Decreases:
7. Withdrawals and distributions of money and the adjusted basis of property distributed
to you from the partnership. Do not include the amount of property distributions
included in the partner's income (taxable income) 7. 33,673.
- Caution:** A distribution may be taxable if the amount exceeds your adjusted basis of
your partnership interest immediately before the distribution.
8. Your decreased share of partnership liabilities and any decrease in your individual liabilities
because they were assumed by the partnership. (Subtract your share of liabilities shown in
item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021
Schedule K-1 and add the amount of your individual liabilities that the partnership assumed
during the tax year (but not less than zero)) 8. _____
9. Your share of the partnership's nondeductible expenses that are not capital
expenditures 9. _____
10. Your share of the partnership's losses and deductions (including capital losses).
However, include your share of the partnership's section 179 expense deduction for
this year even if you cannot deduct all of it because of limitations 10. _____
11. The amount of your deduction for depletion of any partnership oil and gas property,
not to exceed your allocable share of the adjusted basis of that property 11. _____
12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6
and subtract lines 7 through 11 from the total. If zero or less, enter -0-) 12. 61,884.

Caution: The deduction for your share of the partnership's losses and deductions is
limited to your adjusted basis in your partnership interest. If you entered zero on line 12
and the amount figured for line 12 was less than zero, a portion of your share of the
partnership losses and deductions may not be deductible.

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 1

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T MCEWAN MARTINEZ AND DUKES	281,801.	96,940.			9,114.	4,992.
TOTALS	281,801.	96,940.			9,114.	4,992.

FORM 1040 TAX-EXEMPT INTEREST STATEMENT 2

NAME OF PAYER	AMOUNT
RAYMOND JAMES & ASSOCIATES, INC.	3,893.
TOTAL TO FORM 1040, LINE 2A	3,893.

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 3

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE	384.	384.
TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE	25.	25.
RAYMOND JAMES & ASSOCIATES, INC.	4,249.	2,829.
RAYMOND JAMES & ASSOCIATES, INC.	20,109.	13,536.
FROM K-1 - CSE MIXED USE- MULTIFAMILY FUND IV LLC	183.	183.
TOTAL INCLUDED IN FORM 1040, LINE 3A		16,957.

FORM 1040

SOCIAL SECURITY BENEFITS WORKSHEET

STATEMENT 4

CHECK ONLY ONE BOX:

- A. SINGLE, HEAD OF HOUSEHOLD, OR QUALIFYING SURVIVING SPOUSE
- X B. MARRIED FILING JOINTLY
- C. MARRIED FILING SEPARATELY AND LIVED WITH YOUR SPOUSE AT ANY TIME DURING 2022
- D. MARRIED FILING SEPARATELY AND LIVED APART FROM YOUR SPOUSE FOR ALL OF 2022

1. ENTER THE TOTAL AMOUNT FROM BOX 5 OF ALL YOUR FORMS SSA-1099 AND RRB-1099. ALSO, ENTER THIS AMOUNT ON FORM 1040, LINE 6A 49,347.
 IF YOU CHECKED BOX B: TAXPAYER AMOUNT 49,347.
 SPOUSE AMOUNT 24,674.
2. MULTIPLY LINE 1 BY 50% (0.50)
3. ADD THE AMOUNTS ON FORM 1040, LINES 1Z, 2A, 2B, 3B, 4B, 5B, 7 AND 8. IF FILING FORM 8815, DON'T INCLUDE THE AMOUNT FROM LINE 2B. INSTEAD, USE THE AMOUNT FROM SCHEDULE B, LINE 2. DO NOT INCLUDE ANY AMOUNTS FROM BOX 5 OF FORMS SSA-1099 OR RRB-1099 829,250.
4. ENTER THE AMOUNT OF ANY EXCLUSIONS FROM FOREIGN EARNED INCOME, FOREIGN HOUSING, INCOME FROM U.S. POSSESSIONS, OR INCOME FROM PUERTO RICO BY BONA FIDE RESIDENTS OF PUERTO RICO THAT YOU CLAIMED
5. ADD LINES 2, 3, AND 4 853,924.
6. ADD THE AMOUNTS FROM SCHEDULE 1, LINES 11 THROUGH 20, AND 23 AND 25 19,801.
7. SUBTRACT LINE 6 FROM LINE 5 834,123.
8. ENTER: 32,000.
 \$25,000 IF YOU CHECKED BOX A OR D, OR
 \$32,000 IF YOU CHECKED BOX B, OR
 \$-0- IF YOU CHECKED BOX C
9. IS THE AMOUNT ON LINE 8 LESS THAN THE AMOUNT ON LINE 7?
 [] NO. STOP. NONE OF YOUR SOCIAL SECURITY BENEFITS ARE TAXABLE. ENTER -0- ON FORM 1040, LINE 6B. IF YOU ARE MARRIED FILING SEPARATELY AND YOU LIVED APART FROM YOUR SPOUSE FOR ALL OF 2022, BE SURE YOU ENTERED 'D' TO THE RIGHT OF THE WORD "BENEFITS" ON LINE 6A.
 [X] YES. SUBTRACT LINE 8 FROM LINE 7 802,123.
10. ENTER \$9,000 IF YOU CHECKED BOX A OR D,
 \$12,000 IF YOU CHECKED BOX B
 \$-0- IF YOU CHECKED BOX C 12,000.
11. SUBTRACT LINE 10 FROM LINE 9. IF ZERO OR LESS, ENTER -0- 790,123.
12. ENTER THE SMALLER OF LINE 9 OR LINE 10 12,000.
13. ENTER ONE HALF OF LINE 12 6,000.
14. ENTER THE SMALLER OF LINE 2 OR LINE 13 6,000.
15. MULTIPLY LINE 11 BY 85% (.85). IF LINE 11 IS ZERO, ENTER -0- 671,605.
16. ADD LINES 14 AND 15 677,605.
17. MULTIPLY LINE 1 BY 85% (.85) 41,945.
18. TAXABLE BENEFITS. ENTER THE SMALLER OF LINE 16 OR LINE 17 41,945.
 * ALSO ENTER THIS AMOUNT ON FORM 1040, LINE 6B

FORM 1040 TAX STATEMENT 5

DESCRIPTION	AMOUNT
FROM QUALIFIED DIVIDENDS AND CAPITAL GAIN WORKSHEET	190,807.
TOTAL TO FORM 1040, LINE 16	190,807.

FORM 1040 FEDERAL INCOME TAX WITHHELD - FORM(S) W-2 STATEMENT 6

T S DESCRIPTION	AMOUNT
T MCEWAN MARTINEZ AND DUKES	96,940.
TOTAL TO FORM 1040, LINE 25A	96,940.

FORM 1040 CURRENT YEAR ESTIMATES AND
AMOUNT APPLIED FROM PREVIOUS YEAR STATEMENT 7

DESCRIPTION	AMOUNT
1ST QTR ESTIMATE PAYMENT - JOINT	35,000.
2ND QTR ESTIMATE PAYMENT - JOINT	35,000.
3RD QTR ESTIMATE PAYMENT - JOINT	35,000.
4TH QTR ESTIMATE PAYMENT - JOINT	35,000.
TOTAL TO FORM 1040, LINE 26	140,000.

FORM 1040 FEDERAL INCOME TAX WITHHELD - OTHER FORMS STATEMENT 8

T S DESCRIPTION	AMOUNT
FORM 8959, LINE 24	801.
TOTAL TO FORM 1040, LINE 25C	801.

SCHEDULE 1 SELF-EMPLOYED HEALTH INSURANCE DEDUCTION WORKSHEET STATEMENT 9

RAFAEL E. MARTINEZ

MCEWAN, MARTINEZ., DUKES & HALL P.A.

1	NONSPECIFIED HEALTH INSURANCE PAYMENTS	19,801.
2	NET PROFIT FROM TRADE OR BUSINESS UNDER WHICH INSURANCE PLAN IS ESTABLISHED	281,801.
3	TOTAL OF ALL NET PROFITS AND EARNED INCOME. S CORPORATIONS SKIP TO LINE 9	
4	DIVIDE LINE 2 BY LINE 3	
5	DEDUCTIBLE PORTION OF SELF-EMPLOYMENT TAX	
6	LINE 4 TIMES LINE 5	
7	LINE 2 MINUS LINE 6	
8	SELF-EMPLOYED SEP, SIMPLE, AND QUALIFIED PLANS ATTRIBUTABLE TO TRADE OR BUSINESS NAMED ABOVE	
9	LINE 7 MINUS LINE 8. S CORPORATIONS ENTER WAGES RECEIVED	281,801.
10	FORM 2555, LINE 45 ATTRIBUTABLE TO THE TRADE OR BUSINESS NAMED ABOVE	
11	LINE 9 MINUS LINE 10	281,801.
12	SELF-EMPLOYED HEALTH INSURANCE DEDUCTION. LESSER OF LINE 1 OR LINE 11	19,801.

SCHEDULE A	CASH CONTRIBUTIONS	STATEMENT 10
DESCRIPTION	AMOUNT 100% LIMIT	AMOUNT 60% LIMIT
FIRST PRESBYTERIAN CHURCH OF ORLANDO		525.
FSU COLLEGE OF LAW		100.
GO MINISTRIES		100.
BASKER OF BLESSINGS		100.
TRINITY FORUM		100.
ADVENT EARLY HEARING CENTER		100.
2022 WALK TO END ALZHEIMERS		100.
ST JAMES CATHEDRAL		3,700.
FROM K-1 - MCEWAN, MARTINEZ., DUKES & HALL P.A.		453.
SUBTOTALS		5,278.
TOTAL TO SCHEDULE A, LINE 11		5,278.

SCHEDULE A	MEDICAL AND DENTAL EXPENSES	STATEMENT 11
DESCRIPTION	AMOUNT	
SELF-EMPLOYED HEALTH INSURANCE	6,532.	
TOTAL TO SCHEDULE A, LINE 1	6,532.	

SCHEDULE A	STATE AND LOCAL GENERAL SALES TAXES	STATEMENT 12
DESCRIPTION		AMOUNT
STATE SALES TAX		1,899.
LOCAL SALES TAX		158.
TOTAL TO SCHEDULE A, LINE 5A		2,057.

SCHEDULE A

GENERAL SALES TAX DEDUCTION WORKSHEET

STATEMENT 13

1	ENTER YOUR STATE GENERAL SALES TAXES FROM THE APPLICABLE TABLE. FLORIDA IF, FOR ALL OF 2022, YOU LIVED ONLY IN CONNECTICUT, THE DISTRICT OF COLUMBIA, INDIANA, KENTUCKY, MAINE, MARYLAND, MASSACHUSETTS, MICHIGAN, NEW JERSEY, OR RHODE ISLAND, SKIP LINES 2 THROUGH 5, ENTER -0- ON LINE 6, AND GO TO LINE 7. OTHERWISE, GO TO LINE 2.	1,899.
2	DID YOU LIVE IN ALASKA, ARIZONA, ARKANSAS, COLORADO, GEORGIA, ILLINOIS, LOUISIANA, MISSISSIPPI, MISSOURI, NEW YORK, NORTH CAROLINA, SOUTH CAROLINA, TENNESSEE, UTAH, OR VIRGINIA IN 2022? IF NO, ENTER -0-. IF YES, ENTER YOUR LOCAL GENERAL SALES TAXES FROM THE APPLICABLE TABLE.	0.
3	DID YOUR LOCALITY IMPOSE A LOCAL GENERAL SALES TAX IN 2022? RESIDENTS OF CALIFORNIA AND NEVADA SEE INSTRUCTIONS. IF NO, SKIP LINES 3 THROUGH 5, ENTER -0- ON LINE 6 AND GO TO LINE 7. IF YES, ENTER YOUR LOCAL GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	.5000
4	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, SKIP LINES 4 AND 5 AND GO TO LINE 6. IF YES, ENTER YOUR STATE GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	6.0000
5	DIVIDE LINE 3 BY LINE 4. ENTER THE RESULT AS A DECIMAL (ROUNDED TO AT LEAST THREE PLACES).	.0830
6	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, MULTIPLY LINE 2 BY LINE 3. IF YES, MULTIPLY LINE 1 BY LINE 5.	158.
6A ADD LINE 1 AND LINE 6.		2,057.
6B PART-YEAR DAYS RATE.		1.000000
6C MULTIPLY LINE 6A BY LINE 6B.		2,057.
7	ENTER YOUR GENERAL SALES TAXES PAID ON SPECIFIED ITEMS, IF ANY.	
8	DEDUCTION FOR GENERAL SALES TAXES. ADD LINES 6C AND 7. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 5A AND CHECK BOX.	2,057.



SCHEDULE B TAX-EXEMPT INTEREST FROM 1099-DIV STATEMENT 14

NAME OF PAYER	AMOUNT
RAYMOND JAMES & ASSOCIATES, INC.	3,893.
TOTAL TAX-EXEMPT INTEREST FROM 1099-DIV TO SCHEDULE B, LINE 5	3,893.

SCHEDULE D SHORT-TERM CAPITAL GAINS AND LOSSES STATEMENT 15

DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST OR OTHER BASIS	GAIN OR LOSS
COMPUTERSHARE; DSPP				26.	-26.
TOTAL TO SCH D, LINE 1A				26.	-26.

SCHEDULE D NET LONG-TERM GAIN OR LOSS FROM FORMS 4797, 2439, 6252, 4684, 6781 AND 8824 STATEMENT 16

DESCRIPTION OF PROPERTY	GAIN OR LOSS	28% GAIN
FORM 4797	1,047.	
TOTAL TO SCHEDULE D, PART II, LINE 11	1,047.	

SCHEDULE D CAPITAL GAIN DISTRIBUTIONS STATEMENT 17

NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
CONVERSUS STEPSTONE PRIVATE MARKETS	2,588.	
RAYMOND JAMES & ASSOCIATES, INC.	2,474.	
RAYMOND JAMES & ASSOCIATES, INC.	17,908.	
TOTALS TO SCHEDULE D, LINE 13	22,970.	



SCHEDULE E INCOME OR (LOSS) FROM PARTNERSHIPS AND S CORPS STATEMENT 18

NAME

EMP ID NO.

CODE	X IF FRN	BASIS COMP REQ	ANY NOT AT RISK	PASSIVE LOSS	PASSIVE INCOME	NONPASSIVE LOSS	SEC. 179 DEDUCTION	NONPASSIVE INCOME
MCEWAN-EDWARDS BUILDING, LLC								
	P							74,133.
BASIS CARRYOVER								
	P					5,377.		
MCEWAN, MARTINEZ., DUKES & HALL P.A.								
	S	X						423,046.
CSE OPORTUNITY FUND II LLC								
	P				1,867.			
CSE CREDIT TENANT FUND III, LLC								
	P			1.				
C4 HUDSON INVESTOR LLC								
	P				2,905.			
CSE MIXED USE- MULTIFAMILY FUND IV LLC								
	P			8.				
TOTALS TO SCH. E, LN. 29				2,914.	1,867.	5,377.		497,179.

FORM 6251	PASSIVE ACTIVITIES	STATEMENT 19
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NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
CSE OPORTUNITY FUND II LLC	FORM 4797	1,047.	1,047.	
CSE OPORTUNITY FUND II LLC	SCH E	1,867.	1,867.	
CSE CREDIT TENANT FUND III, LLC	SCH E	-1.	-1.	
C4 HUDSON INVESTOR LLC	SCH E	-2,905.	-2,905.	
CSE MIXED USE-MULTIFAMILY FUND IV LLC	SCH E	-8.	-8.	
TOTAL TO FORM 6251, LINE 2M				

FORM 6251	LOSS LIMITATIONS	STATEMENT 20
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NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
MCEWAN-EDWARDS BUILDING, LLC	SCH E	68,644.	68,789.	-145.
TOTAL TO FORM 6251, LINE 2N				-145.

FORM 6251	INTEREST FROM SPECIFIED PRIVATE ACTIVITY BONDS	STATEMENT 21
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DESCRIPTION	AMOUNT
RAYMOND JAMES & ASSOCIATES, INC.	529.
TOTAL TO FORM 6251, LINE 2G	529.

FORM 8995-A QUALIFIED REIT DIVIDENDS AND PTP INCOME STATEMENT 22

NAME OF ENTITY/ACTIVITY	REIT DIVIDENDS	PTP INCOME
RAYMOND JAMES & ASSOCIATES, INC.	53.	
RAYMOND JAMES & ASSOCIATES, INC.	77.	
TOTAL TO FORM 8995-A, LINE 28	130.	

FORM 8995-A QUALIFIED BUSINESS INCOME STATEMENT 23
SCHEDULE C

ACTIVITY NAME	INCOME	LOSS REDUCTION	ADJUSTED QBI
CSE OPORTUNITY FUND II LLC	1,867.	1,867.	0.
MG-CA HUDSON JV LLC	-32,171.		
C4 HUDSON INVESTOR LLC	-63.		
CSE CREDIT TENANT FUND III, LLC	-24.		
CSE MIXED USE- MULTIFAMILY FUND IV LLC	-9.		

FORM 8960 TRADE OR BUSINESS INCOME STATEMENT 24

MCEWAN-EDWARDS BUILDING, LLC	-68,756.
MCEWAN, MARTINEZ., DUKES & HALL P.A.	-423,046.
AMOUNT TO FORM 8960, LINE 4B	-491,802.

FORM 8582 OTHER PASSIVE ACTIVITIES - PART V STATEMENT 25

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
CSE OPORTUNITY FUND II LLC	2,914.	0.		2,914.	
CSE CREDIT TENANT FUND III, LLC	0.	-6.			-6.
C4 HUDSON INVESTOR LLC	0.	-32,234.			-32,234.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	0.	-91.			-91.
TOTALS	2,914.	-32,331.		2,914.	-32,331.

FORM 8582 ALLOCATION OF UNALLOWED LOSSES - PART VII STATEMENT 26

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	.000185580	5.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	.996999783	29,329.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	.002814637	83.
TOTALS		32,331.	1.000000000	29,417.

FORM 8582 ALLOWED LOSSES - PART VIII STATEMENT 27

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	5.	1.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	29,329.	2,905.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	83.	8.
TOTALS		32,331.	29,417.	2,914.

FORM 8582 SUMMARY OF PASSIVE ACTIVITIES STATEMENT 28

R R E A NAME	FORM OR SCHEDULE	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
CSE OPORTUNITY FUND II LLC	FORM 4797	1,047.	1,047.		
CSE OPORTUNITY FUND II LLC	SCH E	1,867.	1,867.		
CSE CREDIT TENANTS FUND III, LLC	SCH E	-6.	-6.	5.	1.
C4 HUDSON INVESTOR LLC	SCH E	-32,234.	-32,234.	29,329.	2,905.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	-91.	-91.	83.	8.
		-29,417.	-29,417.	29,417.	2,914.

RAFAEL E. & REBECCA E. MARTINEZ



TOTALS

PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME

TOTAL TO FORM 8582, LINE 11

2,914.

FORM 8582

ALTERNATIVE MINIMUM TAX
OTHER PASSIVE ACTIVITIES - PART V

STATEMENT 29

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
CSE OPORTUNITY FUND II LLC	2,914.	0.		2,914.	
CSE CREDIT TENANT FUND III, LLC	0.	-6.			-6.
C4 HUDSON INVESTOR LLC	0.	-32,234.			-32,234.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	0.	-91.			-91.
TOTALS	2,914.	-32,331.		2,914.	-32,331.

FORM 8582

ALTERNATIVE MINIMUM TAX
ALLOCATION OF UNALLOWED LOSSES - PART VII

STATEMENT 30

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	.000185580	5.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	.996999783	29,329.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	.002814637	83.
TOTALS		32,331.	1.000000000	29,417.

FORM 8582

ALTERNATIVE MINIMUM TAX
ALLOWED LOSSES - PART VIII

STATEMENT 31

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	5.	1.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	29,329.	2,905.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	83.	8.
TOTALS		32,331.	29,417.	2,914.



FORM 8582AMT SUMMARY OF PASSIVE ACTIVITIES - AMT STATEMENT 32

R R E A	NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
-	CSE OPORTUNITY FUND II LLC	FORM 4797	1,047.		1,047.		
	CSE OPORTUNITY FUND II LLC	SCH E	1,867.		1,867.		
	CSE CREDIT TENANTS FUND III, LLC	SCH E	-6.		-6.	5.	1.
	C4 HUDSON INVESTOR LLC	SCH E	-32,234.		-32,234.	29,329.	2,905.
	CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	-91.		-91.	83.	8.
	TOTALS		-29,417.		-29,417.	29,417.	2,914.
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME							
TOTAL TO FORM 8582AMT, LINE 11							2,914.

Schedule K-1
(Form 1120-S)

 Department of the Treasury
 Internal Revenue Service

2022
☐ Final K-1 ☐ Amended K-1

OMB No. 1545-0123

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

**Shareholder's Share of Income, Deductions,
 Credits, etc.** See separate instructions.

Part I Information About the Corporation		Part III Shareholder's Share of Current Year Income, Deductions, Credits, and Other Items	
A Corporation's employer identification number [REDACTED]		1 Ordinary business income (loss) 423,046.	13 Credits
B Corporation's name, address, city, state, and ZIP code MCEWAN, MARTINEZ, DUKES & HALL P.A. P.O. BOX 753 ORLANDO, FL 32802		2 Net rental real estate inc (loss)	
C IRS Center where corporation filed return E-FILE		3 Other net rental income (loss)	
D Corporation's total number of shares Beginning of tax year 100.00 End of tax year 100.00		4 Interest income 253.	
E Shareholder's identifying number [REDACTED]		5a Ordinary dividends	
F Shareholder's name, address, city, state, and ZIP code RALPH E. MARTINEZ 1115 WOODLAND STREET ORLANDO, FL 32806		5b Qualified dividends	14 Schedule K-3 is attached if checked ☐
G Current year allocation percentage 46.000000%		6 Royalties	15 Alternative min tax (AMT) items
H Shareholder's number of shares Beginning of tax year 46.00 End of tax year 46.00		7 Net short-term capital gain (loss)	
I Loans from shareholder Beginning of tax year \$ End of tax year \$		8a Net long-term capital gain (loss)	
For IRS Use Only		8b Collectibles (28%) gain (loss)	
		8c Unrecaptured sec 1250 gain	
		9 Net section 1231 gain (loss)	16 C* 35,403.
		10 Other income (loss)	D* 345,926.
		11 Section 179 deduction	K* STMT
		12 Other deductions 453.	V* STMT
			AC* STMT
			AD* STMT
		17 A Other information 253.	
		18 ☐ More than one activity for at-risk purposes*	
		19 ☐ More than one activity for passive activity purposes*	

*See attached statement for additional information.

SCHEDULE K-1 NONDEDUCTIBLE EXPENSES, BOX 16, CODE C

DESCRIPTION	AMOUNT	SHAREHOLDER FILING INSTRUCTIONS
NONDEDUCTIBLE ENTERTAINMENT EXPENSE	5,443.	
NONDEDUCTIBLE CLUB DUES	3,781.	
NONDEDUCTIBLE FIRM PARKING	26,179.	
TOTAL	35,403.	

SCHEDULE K-1 DISTRIBUTIONS
BOX 16, CODE D

DESCRIPTION	DATE	AMOUNT	FILING INSTRUCTIONS
CASH DISTRIBUTION	12/31/22	345,926.	
TOTAL		345,926.	

SCHEDULE K-1 DISPOSITIONS OF PROPERTY
WITH SECTION 179 DEDUCTIONS, BOX 17, CODE K

DESCRIPTION OF PROPERTY							
DATE ACQUIRED	DATE SOLD	YEAR OF PASSTHRU	SALES PRICE	COST OR BASIS PLUS EXP.	DEPR. ALLOWED	SEC. 179 EXPENSE	AMT DEPR.
WORK STATIONS							
12/03/12	12/31/22	2012	0.	920.	0.	920.	
2ND HALF OF WORKSTATIONS							
01/25/13	12/31/22	2013	0.	1,029.	0.	1,029.	
DELL OPTIPLEX 7020 DESKTOP							
10/30/15	12/31/22	2015	0.	775.	0.	775.	
TOTAL			0.	2,724.	0.	2,724.	



SCHEDULE K-1

OTHER INFORMATION, BOX 17, CODE AD

DESCRIPTION	AMOUNT	SHAREHOLDER FILING INSTRUCTIONS
MEDICAL INSURANCE PREMIUMS FOR MORE THAN 2% SHAREHOLDERS	19,801.	SEE SHAREHOLDERS INSTRUCTIONS

SCHEDULE K-1

SECTION 199A ADDITIONAL INFORMATION

THE SECTION 199A AMOUNTS TO BE USED IN THE CALCULATION OF THE QUALIFIED BUSINESS INCOME DEDUCTION ON YOUR 1040/1041 RETURN ARE REPORTED ON LINE 17, UNDER CODE V. PLEASE CONSULT YOUR TAX ADVISOR REGARDING THE CALCULATION OF QUALIFIED BUSINESS INCOME DEDUCTION, INCLUDING THE POSSIBLE AGGREGATIONS AND LIMITATIONS THAT MAY APPLY AND THE FILING OF THE 1.199A-4(C)(2)(I) ANNUAL DISCLOSURE STATEMENT.

SCHEDULE K-1

SECTION 199A ITEMS, BOX 17
CODE V

DESCRIPTION

AMOUNT

TRADE OR BUSINESS
X - SSTB

ORDINARY INCOME(LOSS)
W-2 WAGES
UNADJUSTED BASIS

423,046.
1,920,466.
127,022.

SCHEDULE K-1 GROSS RECEIPTS FOR SECTION 448(C), BOX 17, CODE AC

DESCRIPTION

AMOUNT

GROSS RECEIPTS - CURRENT YEAR

3,137,033.

SCHEDULE K-1

SCHEDULE K-3 NOTIFICATION

THE SCHEDULE K-3 HAS NOT BEEN PREPARED FOR YOU. YOU WILL NOT
RECEIVE A COPY OF THE SCHEDULE UNLESS YOU REQUEST ONE.

Schedule K-1
(Form 1065)Department of the Treasury
Internal Revenue Service

2022

For calendar year 2022, or tax year

☐ Final K-1☐ Amended K-1

OMB No. 1545-0123

beginning

ending

Partner's Share of Income, Deductions,
Credits, etc.

See separate instructions.

Part I Information About the Partnership

A Partnership's employer identification number

B Partnership's name, address, city, state, and ZIP code

MCEWAN-EDWARDS BUILDING, LLC
108 EAST CENTRAL BLVD.
ORLANDO, FL 32801

C IRS center where partnership filed return:

E-FILE

D ☐ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's SSN or TIN (Do not use TIN of a disregarded entity. See instructions.)

F Name, address, city, state, and ZIP code for partner entered in E. See instructions.

RAFAEL E. & REBECCA MARTINEZ
AS TENANTS BY THE ENTIRETIES
1115 WOODLAND STREET
ORLANDO, FL 32806G ☒ General partner or LLC
member-manager☐ Limited partner or other LLC
memberH1 ☒ Domestic partner☐ Foreign partnerH2 ☐ If the partner is a disregarded entity (DE), enter the partner's:

TIN _____ Name _____

I1 What type of entity is this partner? INDIVIDUALI2 If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here ☐

J Partner's share of profit, loss, and capital:

	Beginning	Ending
Profit	50.0000000%	50.0000000%
Loss	50.0000000%	50.0000000%
Capital	50.0000000%	50.0000000%

Check if decrease is due to sale or exchange of partnership interest ☐

K Partner's share of liabilities:

	Beginning	Ending
Nonrecourse	\$	\$
Qualified nonrecourse financing	\$	\$
Recourse	\$ 481.	\$ 481.

Check this box if item K includes liability amounts from lower-tier partnerships ☐

L Partner's Capital Account Analysis

Beginning capital account	\$ 236,578.
Capital contributed during the year	\$
Current year net income (loss)	\$ 74,166.
Other increase (decrease) (attach explanation)	\$
Withdrawals and distributions	\$(82,578.)
Ending capital account	\$ 228,166.

M Did the partner contribute property with a built-in gain (loss)?

☐ Yes ☒ No If "Yes," attach statement. See instructions.

N Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)

Beginning	\$
Ending	\$

Part III Partner's Share of Current Year Income,
Deductions, Credits, and Other Items

1 Ordinary business income (loss)	0.	14 Self-employment earnings (loss)	0.
2 Net rental real estate income (loss)	78,345.	15 Credits	
3 Other net rental income (loss)		16 Schedule K-3 is attached if checked ☐	
4a Guaranteed payments for services		17 Alternative min tax (AMT) items	-145.
4b Guaranteed payments for capital		A	
4c Total guaranteed payments		18 Tax-exempt income and nondeductible expenses	
5 Interest income	33.	19 Distributions	82,578.
6a Ordinary dividends		A	
6b Qualified dividends		20 Other information	33.
6c Dividend equivalents		A	
7 Royalties		Z	* STMT
8 Net short-term capital gain (loss)			
9a Net long-term capital gain (loss)			
9b Collectibles (28%) gain (loss)			
9c Unrecaptured section 1250 gain			
10 Net section 1231 gain (loss)			
11 Other income (loss)			
12 Section 179 deduction		21 Foreign taxes paid or accrued	
13 Other deductions	4,212.		
W*			
22 ☐ More than one activity for at-risk purposes*			
23 ☐ More than one activity for passive activity purposes*			

*See attached statement for additional information.

For IRS Use Only

SCHEDULE K-1

OTHER DEDUCTIONS, BOX 13, CODE W

DESCRIPTION	PARTNER FILING INSTRUCTIONS	AMOUNT
SECTION 754 DEPRECIATION - RENTAL REAL ESTATE	SEE IRS SCH. K-1 INSTRUCTIONS	4,212.
TOTAL TO SCHEDULE K-1, BOX 13, CODE W		4,212.

SCHEDULE K-1

SECTION 199A INFORMATION, BOX 20, CODE Z

DESCRIPTION	AMOUNT
RENT - COMMERCIAL BUILDING	
X - SSTB	
RENTAL INCOME (LOSS)	78,345.
OTHER DEDUCTIONS *	4,212.
SECTION 754 DEPRECIATION DEDUCTION	4,212.
UNADJUSTED BASIS OF ASSETS	337,070.

SCHEDULE K-1 SECTION 199A ADDITIONAL INFORMATION

THE SECTION 199A AMOUNTS TO BE USED IN THE CALCULATION OF QUALIFIED BUSINESS INCOME DEDUCTION ON YOUR 1040/1041 RETURN ARE REPORTED ON LINE 20, UNDER CODE Z. PLEASE CONSULT YOUR TAX ADVISOR REGARDING THE CALCULATION OF THE QUALIFIED BUSINESS INCOME DEDUCTION, INCLUDING THE POSSIBLE AGGREGATIONS AND LIMITATIONS THAT MAY APPLY AND THE FILING OF THE 1.199A-4(C)(2)(I) ANNUAL DISCLOSURE STATEMENT.

SCHEDULE K-1 CURRENT YEAR NET INCOME (LOSS) AND
OTHER INCREASES(DECREASES)

DESCRIPTION	AMOUNT	TOTALS
RENTAL REAL ESTATE INCOME (LOSS)	78,345.	
INTEREST INCOME	33.	
SCHEDULE K-1 INCOME SUBTOTAL		78,378.
OTHER DEDUCTIONS	-4,212.	
SCHEDULE K-1 DEDUCTIONS SUBTOTAL		-4,212.
NET INCOME (LOSS) PER SCHEDULE K-1		74,166.

SCHEDULE K-1 SCHEDULE K-3 NOTIFICATION

THE SCHEDULE K-3 HAS NOT BEEN PREPARED FOR YOU. YOU WILL NOT RECEIVE A COPY OF THE SCHEDULE UNLESS YOU REQUEST ONE.

Schedule of Activities

For calendar year 2022, or tax year beginning

, 2022, and ending

Name: **MCEWAN-EDWARDS BUILDING, LLC**For: **RAFAEL E. & REBECCA MARTINEZ AS TENAN**

Description of Activity	Activity Number	100% Disposed	PTP	P/T 199A	Type Code	Description
	1				7	COMMERCIAL BUILDING
Ordinary business income (loss)						Activity - 1
Net rental real estate income (loss)						78,345.
Other net rental income (loss)						
Interest income						
Dividends - Ordinary dividends						
- Qualified dividends						
- Dividend equivalents (1065 only)						
Royalties						
Net short-term capital gain (loss)						
Net long-term capital gain (loss)						
- Collectibles (28%) gain (loss)						
- Unrecaptured Section 1250 gain						
Net section 1231 gain (loss)						
Other portfolio income						
Section 1256 contracts and straddles						
Other income						
Section 179 deduction						
Charitable contributions						
Portfolio deductions						
Investment interest expense						
Section 59(e)(2) expenditures						
Excess business interest expense						4,212.
Other deductions						
Net earnings from self-employment						
Gross farming or fishing income						
Gross nonfarm income						
LIH credit - Section 42(j)(5) partnerships						
- Other						
Qualified rehabilitation expenditures related to rental real estate						
Other rental credits						
Credits related to other rental activities						
Recapture of LIH credit - Section 42(j)(5) partnerships						
- Other						
Other credits						-145.
Post-1986 depreciation adjustment						
Adjusted gain or loss						
Portion of adjusted gain/loss allocable to short-term gain/loss						
Portion of adjusted gain/loss allocable to long-term gain/loss						
Portion of adjusted gain/loss allocable to section 1231 gain/loss						
Depletion (other than oil and gas)						
Oil, gas and geothermal properties - gross income						
Oil, gas and geothermal properties - deductions						
Other AMT items						
Investment income						
Investment expenses						
Section 199A - W-2 wages						337,070.
- Unadjusted basis of assets						
- REIT dividends						
- Cooperative qualified business income						
- Cooperative W-2 wages						

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 RAFAEL E.		Last name MARTINEZ		Your social security number [REDACTED]	
If joint return, spouse's first name and middle initial REBECCA E.		Last name MARTINEZ		Spouse's social security number [REDACTED]	
Home address (number and street). If you have a P.O. box, see instructions. 1115 WOODLAND STREET				Apt. no.	
City, town, or post office. If you have a foreign address, also complete spaces below. ORLANDO				State ZIP code FL 32806	
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 dependents

Income		1a Total amount from Form(s) W-2, box 1 (see instructions) STMT 1		1a	281,801.	
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	281,801.	
Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.	2a Tax-exempt interest	2a	3,893.	b Taxable interest	2b	1,582.
	3a Qualified dividends	3a	16,957.	b Ordinary dividends	3b	27,228.
	4a IRA distributions	4a		b Taxable amount	4b	
	5a Pensions and annuities	5a		b Taxable amount	5b	
Standard Deduction for - • Single or Married filing separately, \$12,950 • Married filing jointly or Qualifying surviving spouse, \$25,900 • Head of household, \$19,400 • If you checked any box under Standard Deduction, see instructions.	6a Social security benefits	6a	49,347.	b Taxable amount	6b	41,945.
	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	23,991.	
	8 Other income from Schedule 1, line 10			8	490,755.	
9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income				9	867,302.	
10 Adjustments to income from Schedule 1, line 26				10	19,801.	
11 Subtract line 10 from line 9. This is your adjusted gross income				11	847,501.	
12 Standard deduction or itemized deductions (from Schedule A)				12	136,074.	
13 Qualified business income deduction from Form 8995 or Form 8995-A				13	26.	
14 Add lines 12 and 13				14	136,100.	
15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income				15	711,401.	

Tax and Credits	16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	16	190,807.
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	190,807.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	129.
	21	Add lines 19 and 20	21	129.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	190,678.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	3,726.
24	Add lines 22 and 23. This is your total tax	24	194,404.	
Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2 SEE STATEMENT 6	25a	96,940.
	b	Form(s) 1099	25b	
	c	Other forms (see instructions) SEE STATEMENT 8	25c	801.
	d	Add lines 25a through 25c	25d	97,741.
	26	2022 estimated tax payments and amount applied from 2021 return STATEMENT 7	26	140,000.
	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	237,741.	
Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	43,337.
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐	35a	43,337.
	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	
	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 J. ALDEN BAKER, CPA Phone no. 407-425-5200 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
	[REDACTED]			ATTORNEY
	Spouse's signature. If a joint return, both must sign.		Date	Spouse's occupation
[REDACTED]			HOUSEWIFE	
Phone no.		Email address RMARTINEZ@MMDORL.COM		
Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN
	J. ALDEN BAKER, CPA	J. ALDEN BAKER, CPA		P00599377
Check if: ☐ Self-employed				Phone no. (407) 425-5200
Firm's name BAKER, HYATT, HOMRICH & ZOKVIC, P.A.				Firm's EIN 59-3096580
Firm's address 2203 EAST MICHIGAN STREET ORLANDO, FL 32806-4944				

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

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

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	490,755.
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	490,755.

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

Schedule 1 (Form 1040) 2022

Part II Adjustments to Income

11	Educator expenses	11	
12	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	12	
13	Health savings account deduction. Attach Form 8889	13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903	14	
15	Deductible part of self-employment tax. Attach Schedule SE	15	
16	Self-employed SEP, SIMPLE, and qualified plans	16	
17	Self-employed health insurance deduction	17	19,801.
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	19,801.

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

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐	8	
9	Household employment taxes. Attach Schedule H	9	1,408.
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10	
11	Additional Medicare Tax. Attach Form 8959	11	351.
12	Net investment income tax. Attach Form 8960	12	1,967.
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)

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

Schedule 2 (Form 1040) 2022

Part II Other Taxes (continued)

17	Other additional taxes:			
a	Recapture of other credits. List type, form number, and amount	17a		
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	17b		
c	Additional tax on HSA distributions. Attach Form 8889	17c		
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17d		
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e		
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f		
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g		
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h		
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i		
j	Section 72(m)(5) excess benefits tax	17j		
k	Golden parachute payments	17k		
l	Tax on accumulation distribution of trusts	17l		
m	Excise tax on insider stock compensation from an expatriated corporation	17m		
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n		
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o		
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p		
q	Any interest from Form 8621, line 24	17q		
z	Any other taxes. List type and amount:	17z		
18	Total additional taxes. Add lines 17a through 17z		18	
19	Reserved for future use		19	
20	Section 965 net tax liability installment from Form 965-A	20		
21	Add lines 4, 7 through 16, and 18. These are your total other taxes . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		21	3,726.

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

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	129.
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441	2	
3	Education credits from Form 8863, line 19	3	
4	Retirement savings contributions credit. Attach Form 8880	4	
5	Residential energy credits. Attach Form 5695	5	
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800	6a	
b	Credit for prior year minimum tax. Attach Form 8801	6b	
c	Adoption credit. Attach Form 8839	6c	
d	Credit for the elderly or disabled. Attach Schedule R	6d	
e	Alternative motor vehicle credit. Attach Form 8910	6e	
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f	
g	Mortgage interest credit. Attach Form 8396	6g	
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h	
i	Qualified electric vehicle credit. Attach Form 8834	6i	
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j	
k	Credit to holders of tax credit bonds. Attach Form 8912	6k	
l	Amount on Form 8978, line 14. See instructions	6l	
z	Other nonrefundable credits. List type and amount:	6z	
7	Total other nonrefundable credits. Add lines 6a through 6z	7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20	8	129.

(continued on page 2)

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

Schedule 3 (Form 1040) 2022

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962	9	
10	Amount paid with request for extension to file (see instructions)	10	
11	Excess social security and tier 1 RRTA tax withheld	11	
12	Credit for federal tax on fuels. Attach Form 4136	12	
13	Other payments or refundable credits:		
a	Form 2439	13a	
b	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b	
c	Reserved for future use	13c	
d	Credit for repayment of amounts included in income from earlier years	13d	
e	Reserved for future use	13e	
f	Deferred amount of net 965 tax liability (see instructions)	13f	
g	Reserved for future use	13g	
h	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021	13h	
z	Other payments or refundable credits. List type and amount:	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31	15	

Schedule 3 (Form 1040) 2022

SCHEDULE A
(Form 1040)

Department of the Treasury
Internal Revenue Service

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**

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

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ

Medical and Dental Expenses	Caution: Do not include expenses reimbursed or paid by others.			
	1 Medical and dental expenses (see instructions) SEE STATEMENT 11	1	6,532.	
	2 Enter amount from Form 1040 or 1040-SR, line 11 2 847,501.	2	847,501.	
	3 Multiply line 2 by 7.5% (0.075)	3	63,563.	
	4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	0.	
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 SEE STATEMENT 12 ☒	5a	2,057.	
	b State and local real estate taxes (see instructions)	5b	8,341.	
	c State and local personal property taxes	5c		
	d Add lines 5a through 5c	5d	10,398.	
	e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)	5e	10,000.	
	6 Other taxes. List type and amount:	6		
	7 Add lines 5e and 6	7	10,000.	
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	8a		
	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	8b		
	c Points not reported to you on Form 1098. See instructions for special rules	8c		
	d Reserved for future use	8d		
	e Add lines 8a through 8c	8e		
	9 Investment interest. Attach Form 4952 if required. See instructions	9		
	10 Add lines 8e and 9	10		
	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	11	5,278.
		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	12	120,796.
13 Carryover from prior year		13		
14 Add lines 11 through 13		14	126,074.	
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	15		
Other Itemized Deductions	16 Other - from list in instructions. List type and amount:	16		
Total 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	17	136,074.	
	18 If you elect to itemize deductions even though they are less than your standard deduction, check this box ☐			

SCHEDULE B

(Form 1040)

Department of the Treasury

Internal Revenue Service

Name(s) shown on return

Interest and Ordinary Dividends

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

Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

2022

Attachment Sequence No. 08

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ
Part I
Interest

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address _____
- JPMORGAN CHASE BANK NA _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- FROM K-1 - MCEWAN-EDWARDS BUILDING, LLC _____
- FROM K-1 - MCEWAN, MARTINEZ., DUKES & HALL P.A. _____
- FROM K-1 - CSE MIXED USE- MULTIFAMILY FUND IV LLC _____

Amount

91.

62.

1,128.

33.

253.

15.

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

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

1,582.

1,582.

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

Part II
Ordinary Dividends

- 5 List name of payer _____
- CONVERSUS STEPSTONE PRIVATE MARKETS _____
- SREIT CLASS T SHARES _____
- TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE _____
- TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE _____
- VINEBROOK HOMES TRUST, INC. A _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- RAYMOND JAMES & ASSOCIATES, INC. _____
- FROM K-1 - CSE MIXED USE- MULTIFAMILY FUND IV LLC _____

2,278.

384.

25.

8,142.

20,109.

183.

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

SUBTOTAL FOR LINE 5 _____

TAX-EXEMPT DIVIDENDS **SEE STATEMENT 14** _____

31,121.

-3,893.

27,228.

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

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

Part III
Foreign Accounts and Trusts

Caution: If required, failure to file Fin CEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instr. 12-07-22

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

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

Yes	No
	X
	X

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ

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		26.		<26.>
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7 <26.>

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 1,047.
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 22,970.
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 24,017.

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

Schedule D (Form 1040) 2022

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	23,991.
• 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.	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.		

Qualified Dividends and Capital Gain Tax Worksheet - Line 16

Keep for Your Records

Name(s) shown on return RAFAEL E. & REBECCA E. MARTINEZ	Your SSN [REDACTED]
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Before you begin:

- ✓ See the earlier instructions for line 16 to see if you can use this worksheet to figure your tax.
- ✓ Before completing this worksheet, complete Form 1040 or 1040-SR through line 15.
- ✓ If you don't have to file Schedule D and you received capital gain distributions, be sure you checked the box on Form 1040 or 1040-SR, line 7.

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	<u>711,401.</u>
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	<u>16,957.</u>
3. Are you filing Schedule D?*		
☒ Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or a loss, enter -0-.	3.	<u>23,991.</u>
☐ No. Enter the amount from Form 1040 or 1040-SR, line 7.		
4. Add lines 2 and 3	4.	<u>40,948.</u>
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	<u>670,453.</u>
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.	6.	<u>83,350.</u>
7. Enter the smaller of line 1 or line 6	7.	<u>83,350.</u>
8. Enter the smaller of line 5 or line 7	8.	<u>83,350.</u>
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	<u>0.</u>
10. Enter the smaller of line 1 or line 4	10.	<u>40,948.</u>
11. Enter the amount from line 9	11.	<u>0.</u>
12. Subtract line 11 from line 10	12.	<u>40,948.</u>
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.	13.	<u>517,200.</u>
14. Enter the smaller of line 1 or line 13	14.	<u>517,200.</u>
15. Add lines 5 and 9	15.	<u>670,453.</u>
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	<u>0.</u>
17. Enter the smaller of line 12 or line 16	17.	<u>0.</u>
18. Multiply line 17 by 15% (0.15)	18.	<u>0.</u>
19. Add lines 9 and 17	19.	<u>0.</u>
20. Subtract line 19 from line 10	20.	<u>40,948.</u>
21. Multiply line 20 by 20% (0.20)	21.	<u>8,190.</u>
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	<u>182,617.</u>
23. Add lines 18, 21, and 22	23.	<u>190,807.</u>
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	<u>197,767.</u>
25. Tax on all taxable income. Enter the smaller of line 23 or 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	<u>190,807.</u>

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

Name(s) shown on return. Do not enter name and Social Security number if shown on page 1.

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ**Caution:** The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.**Part II Income or Loss From Partnerships and S Corporations**

Note: If you report a loss, receive a distribution, dispose of stock, or receive a loan repayment from an S corporation, you **must** check the box in column (e) on line 28 and attach the required basis computation. If you report a loss from an at-risk activity for which any amount is **not** at risk, you **must** check the box in column (f) on line 28 and attach **Form 6198**. See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section ☒ **Yes** ☐ **No**

28 (a) Name		(b) Enter P for partnership, S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if basis computation is required	(f) Check if any amount is not at risk
A	SEE STATEMENT 18					
B						
C						
D						
Passive Income and Loss		Nonpassive Income and Loss				
(g) Passive loss allowed (attach Form 8582 if required)		(h) Passive income from Schedule K-1	(i) Nonpassive loss allowed (see Schedule K-1)	(j) Section 179 expense deduction from Form 4582	(k) Nonpassive income from Schedule K-1	
A						
B						
C						
D						
29a Totals		1,867.			497,179.	
b Totals	2,914.		5,377.			
30 Add columns (h) and (k) of line 29a						30 499,046.
31 Add columns (g), (i), and (j) of line 29b						31 (8,291.)
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31						32 490,755.

Part III Income or Loss From Estates and Trusts

33 (a) Name		(b) Employer identification number	
A			
B			
Passive Income and Loss		Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)		(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1
		(f) Other income from Schedule K-1	
A			
B			
34a Totals			
b Totals			
35 Add columns (d) and (f) of line 34a			35
36 Add columns (c) and (e) of line 34b			36 ()
37 Total estate and trust income or (loss). Combine lines 35 and 36			37

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

38 (a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b
39 Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below				39

Part V Summary

40 Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41 Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Schedule 1 (Form 1040), line 5	41	490,755.
42 Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120-S), box 17, code AD; and Schedule K-1 (Form 1041), box 14, code F. See instructions.	42	
43 Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040, Form 1040-SR, or Form 1040-NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Form **4797**Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Sales of Business Property
(Also Involuntary Conversions and Recapture Amounts
Under Sections 179 and 280F(b)(2))

Attach to your tax return.

Go to www.irs.gov/Form4797 for instructions and the latest information.

OMB No. 1545-0184

2022Attachment
Sequence No. **27**

Identifying number

RAFAEL E. & REBECCA E. MARTINEZ

1a Enter the gross proceeds from sales or exchanges reported to you for 2022 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20	1a
b Enter the total amount of gain that you are including on lines 2, 10, and 24 due to the partial dispositions of MACRS assets	1b
c Enter the total amount of loss that you are including on lines 2 and 10 due to the partial dispositions of MACRS assets	1c

Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft—Most Property Held More Than 1 Year (see instructions)

2	(a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
	CSE OPORTUNITY FUND						1,047.
	II LLC						

3 Gain, if any, from Form 4684, line 39	3
4 Section 1231 gain from installment sales from Form 6252, line 26 or 37	4
5 Section 1231 gain or (loss) from like-kind exchanges from Form 8824	5
6 Gain, if any, from line 32, from other than casualty or theft	6
7 Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows	7
Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below. Individuals, partners, S corporation shareholders, and all others. If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you didn't have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.	
8 Nonrecaptured net section 1231 losses from prior years. See instructions	8
9 Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return. See instructions	9

Part II Ordinary Gains and Losses (see instructions)

10 Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):							
MCEWAN, MARTINEZ.,							
DUKES & HALL P.A.				2,724.	0.	2,724.	0.
11 Loss, if any, from line 7	11						
12 Gain, if any, from line 7 or amount from line 8, if applicable	12						
13 Gain, if any, from line 31	13						
14 Net gain or (loss) from Form 4684, lines 31 and 38a	14						
15 Ordinary gain from installment sales from Form 6252, line 25 or 36	15						
16 Ordinary gain or (loss) from like-kind exchanges from Form 8824	16						
17 Combine lines 10 through 16	17						
18 For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below.							
a If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions							
18a							
b Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Schedule 1 (Form 1040), Part I, line 4							
18b							

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **4797** (2022)

Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property:		(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)
A			
B			
C			
D			
These columns relate to the properties on lines 19A through 19D.		Property A	Property B
		Property C	Property D
20	Gross sales price (Note: See line 1a before completing.)	20	
21	Cost or other basis plus expense of sale	21	
22	Depreciation (or depletion) allowed or allowable	22	
23	Adjusted basis. Subtract line 22 from line 21	23	
24	Total gain. Subtract line 23 from line 20	24	
25	If section 1245 property:		
a	Depreciation allowed or allowable from line 22	25a	
b	Enter the smaller of line 24 or 25a	25b	
26	If section 1250 property: If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291.		
a	Additional depreciation after 1975. See instructions	26a	
b	Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions	26b	
c	Subtract line 26a from line 24. If residential rental property or line 24 isn't more than line 26a, skip lines 26d and 26e	26c	
d	Additional depreciation after 1969 and before 1976	26d	
e	Enter the smaller of line 26c or 26d	26e	
f	Section 291 amount (corporations only)	26f	
g	Add lines 26b, 26e, and 26f	26g	
27	If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership.		
a	Soil, water, and land clearing expenses	27a	
b	Line 27a multiplied by applicable percentage	27b	
c	Enter the smaller of line 24 or 27b	27c	
28	If section 1254 property:		
a	Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions	28a	
b	Enter the smaller of line 24 or 28a	28b	
29	If section 1255 property:		
a	Applicable percentage of payments excluded from income under section 126. See instructions	29a	
b	Enter the smaller of line 24 or 29a. See instructions	29b	

Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

30	Total gains for all properties. Add property columns A through D, line 24	30	
31	Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13	31	
32	Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6	32	

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

	(a) Section 179	(b) Section 280F(b)(2)
33	Section 179 expense deduction or depreciation allowable in prior years	33
34	Recomputed depreciation. See instructions	34
35	Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35

Alternative Minimum Tax - Individuals

Go to www.irs.gov/Form6251 for instructions and the latest information.
Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022
Attachment
Sequence No. **32**

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

Your social security number

RAFAEL E. & REBECCA E. MARTINEZ

Part I Alternative Minimum Taxable Income

1	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract line 14 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	1	711,401.
2a	If filing Schedule A (Form 1040), enter the taxes from Schedule A, line 7; otherwise, enter the amount from Form 1040 or 1040-SR, line 12	2a	10,000.
2b	Tax refund from Schedule 1 (Form 1040), line 1 or line 8z	2b	
2c	Investment interest expense (difference between regular tax and AMT)	2c	
2d	Depletion (difference between regular tax and AMT)	2d	
2e	Net operating loss deduction from Schedule 1 (Form 1040), line 8a. Enter as a positive amount	2e	
2f	Alternative tax net operating loss deduction	2f	
2g	Interest from specified private activity bonds exempt from the regular tax SEE STATEMENT 21	2g	529.
2h	Qualified small business stock, see instructions	2h	
2i	Exercise of incentive stock options (excess of AMT income over regular tax income)	2i	
2j	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	2j	
2k	Disposition of property (difference between AMT and regular tax gain or loss)	2k	
2l	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	2l	
2m	Passive activities (difference between AMT and regular tax income or loss) SEE STATEMENT 19	2m	0.
2n	Loss limitations (difference between AMT and regular tax income or loss) SEE STATEMENT 20	2n	-145.
2o	Circulation costs (difference between regular tax and AMT)	2o	
2p	Long-term contracts (difference between AMT and regular tax income)	2p	
2q	Mining costs (difference between regular tax and AMT)	2q	
2r	Research and experimental costs (difference between regular tax and AMT)	2r	
2s	Income from certain installment sales before January 1, 1987	2s	
2t	Intangible drilling costs preference	2t	
3	Other adjustments, including income-based related adjustments	3	
4	Alternative minimum taxable income. Combine lines 1 through 3. (If married filing separately and line 4 is more than \$776,100, see instructions.)	4	721,785.

Part II Alternative Minimum Tax (AMT)

5	Exemption. IF your filing status is ... AND line 4 is not over ... THEN enter on line 5 ... Single or head of household ... \$539,900 ... \$75,900 Married filing jointly or qualifying widow(er) ... 1,079,800 ... 118,100 Married filing separately ... 539,900 ... 59,050 If line 4 is over the amount shown above for your filing status, see instructions.	5	118,100.
6	Subtract line 5 from line 4. If more than zero, go to line 7. If zero or less, enter -0- here and on lines 7, 9, and 11, and go to line 10	6	603,685.
7	• If you are filing Form 2555, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; you reported qualified dividends on Form 1040 or 1040-SR, line 3a; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 40 here. • All others: If line 6 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result.	7	161,634.
8	Alternative minimum tax foreign tax credit (see instructions)	8	129.
9	Tentative minimum tax. Subtract line 8 from line 7	9	161,505.
10	Add Form 1040 or 1040-SR, line 16 (minus any tax from Form 4972), and Schedule 2 (Form 1040), line 2. Subtract from the result Schedule 3 (Form 1040), line 1 and any negative amount reported on Form 8978, line 14 (treated as a positive number). If zero or less, enter -0-. If you used Schedule J to figure your tax on Form 1040 or 1040-SR, line 16, refigure that tax without using Schedule J before completing this line. See instructions	10	190,678.
11	AMT. Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1	11	0.

Part III Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 7 or by the Foreign Earned Income Tax Worksheet in the instructions.

12 Enter the amount from Form 6251, line 6. If you are filing Form 2555, enter the amount from line 3 of the worksheet in the instructions for line 7	12	603,685.
13 Enter the amount from line 4 of the Qualified Dividends and Capital Gain Tax Worksheet in the Instructions for Form 1040 or the amount from line 13 of the Schedule D Tax Worksheet in the Instructions for Schedule D (Form 1040), whichever applies (as figured for the AMT, necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	13	40,948.
14 Enter the amount from Schedule D (Form 1040), line 19 (as figured for the AMT, if necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	14	
15 If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 13. Otherwise, add lines 13 and 14, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as figured for the AMT, if necessary). If you are filing Form 2555, see instructions for the amount to enter	15	40,948.
16 Enter the smaller of line 12 or line 15	16	40,948.
17 Subtract line 16 from line 12	17	562,737.
18 If line 17 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result	18	153,444.
19 Enter: • \$83,350 if married filing jointly or qualifying widow(er), • \$41,675 if single or married filing separately, or • \$55,800 if head of household.	19	83,350.
20 Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 14 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	20	670,453.
21 Subtract line 20 from line 19. If zero or less, enter -0-	21	0.
22 Enter the smaller of line 12 or line 13	22	40,948.
23 Enter the smaller of line 21 or line 22. This amount is taxed at 0%	23	0.
24 Subtract line 23 from line 22	24	40,948.
25 Enter: • \$459,750 if single, • \$258,600 if married filing separately, • \$517,200 if married filing jointly or qualifying widow(er), or • \$488,500 if head of household.	25	517,200.
26 Enter the amount from line 21	26	0.
27 Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 21 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	27	670,453.
28 Add line 26 and line 27	28	670,453.
29 Subtract line 28 from line 25. If zero or less, enter -0-	29	0.
30 Enter the smaller of line 24 or line 29	30	0.
31 Multiply line 30 by 15% (0.15)	31	
32 Add lines 23 and 30	32	0.
If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33.		
33 Subtract line 32 from line 22	33	40,948.
34 Multiply line 33 by 20% (0.20)	34	8,190.
If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35.		
35 Add lines 17, 32, and 33	35	
36 Subtract line 35 from line 12	36	
37 Multiply line 36 by 25% (0.25)	37	
38 Add lines 18, 31, 34, and 37	38	161,634.
39 If line 12 is \$206,100 or less (\$103,050 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract \$4,122 (\$2,061 if married filing separately) from the result	39	164,910.
40 Enter the smaller of line 38 or line 39 here and on line 7. If you are filing Form 2555, do not enter this amount on line 7. Instead, enter it on line 4 of the worksheet in the instructions for line 7	40	161,634.

SCHEDULE H
(Form 1040)

Department of the Treasury
Internal Revenue Service

Household Employment Taxes

(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)

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

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

OMB No. 1545-0074

2022

Attachment
Sequence No. **44**

Name of employer

Social security number

Employer identification number

RAFAEL E. MARTINEZ

Calendar year taxpayers having no household employees in 2022 don't have to complete this form for 2022.

A Did you pay **any one** household employee cash wages of \$2,400 or more in 2022? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions before you answer this question.)

☒ **Yes.** Skip lines B and C and go to line 1a.

☐ **No.** Go to line B.

B Did you withhold federal income tax during 2022 for any household employee?

☐ **Yes.** Skip line C and go to line 7.

☐ **No.** Go to line C.

C Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2021 or 2022 to **all** household employees? (**Don't** count cash wages paid in 2021 or 2022 to your spouse, your child under age 21, or your parent.)

☐ **No. Stop.** Don't file this schedule.

☐ **Yes.** Skip lines 1a-9 and go to line 10.

Part I Social Security, Medicare, and Federal Income Taxes

1a	Total cash wages subject to social security tax	1a	8,925.		
b	Qualified sick and family leave wages paid in 2022 for leave taken after March 31, 2020, and before April 1, 2021, included on line 1a	1b			
2a	Social security tax. Multiply line 1a by 12.4% (0.124)	2a		1,107.	
b	Employer share of social security tax on qualified sick and family leave wages paid in 2022 for leave taken after March 31, 2020, and before April 1, 2021. Multiply line 1b by 6.2% (0.062)	2b			
c	Total social security tax. Subtract line 2b from line 2a	2c		1,107.	
3	Total cash wages subject to Medicare tax	3	8,925.		
4	Medicare tax. Multiply line 3 by 2.9% (0.029)	4		259.	
5	Total cash wages subject to Additional Medicare Tax withholding	5			
6	Additional Medicare Tax withholding. Multiply line 5 by 0.9% (0.009)	6			
7	Federal income tax withheld, if any	7			
8a	Total social security, Medicare, and federal income taxes. Add lines 2c, 4, 6, and 7	8a		1,366.	
b	Nonrefundable portion of credit for qualified sick and family leave wages for leave taken before April 1, 2021	8b			
c	Nonrefundable portion of credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021	8c			
d	Total social security, Medicare, and federal income taxes after nonrefundable credits. Add lines 8b and 8c and then subtract that total from line 8a	8d		1,366.	
e	Refundable portion of credit for qualified sick and family leave wages for leave taken before April 1, 2021	8e			
f	Refundable portion of credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021	8f			
g	Qualified sick leave wages for leave taken before April 1, 2021	8g			
h	Qualified health plan expenses allocable to qualified sick leave wages reported on line 8g	8h			
i	Qualified family leave wages for leave taken before April 1, 2021	8i			
j	Qualified health plan expenses allocable to qualified family leave wages reported on line 8i	8j			
k	Qualified sick leave wages for leave taken after March 31, 2021, and before October 1, 2021	8k			
l	Qualified health plan expenses allocable to qualified sick leave wages reported on line 8k	8l			
m	Qualified family leave wages for leave taken after March 31, 2021, and before October 1, 2021	8m			
n	Qualified health plan expenses allocable to qualified family leave wages reported on line 8m	8n			

9 Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2021 or 2022 to **all** household employees?

(**Don't** count cash wages paid in 2021 or 2022 to your spouse, your child under age 21, or your parent.)

☐ **No. Stop.** Include the amount from line 8d above on Schedule 2 (Form 1040), line 9. Include the amounts, if any, from line 8e on Schedule 3 (Form 1040), line 13b, and line 8f on Schedule 3 (Form 1040), line 13h. If you're not required to file Form 1040, see the line 9 instructions.

☒ **Yes.** Go to line 10.

Part II	Federal Unemployment (FUTA) Tax
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Part II Federal Unemployment (FUTA) Tax		Yes	No
10	Did you pay unemployment contributions to only one state? If you paid contributions to a credit reduction state, see instructions and check "No."	X	
11	Did you pay all state unemployment contributions for 2022 by April 18, 2023? Fiscal year filers, see instructions	X	
12	Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?	X	

Next: If you checked the **"Yes"** box on **all** the lines above, complete Section A.
If you checked the **"No"** box on **any** of the lines above, skip Section A and complete Section B.

Section A

13	Name of the state where you paid unemployment contributions	FL	
14	Contributions paid to your state unemployment fund	14	7.
15	Total cash wages subject to FUTA tax	15	7,000.
16	FUTA tax. Multiply line 15 by 0.6% (0.006). Enter the result here, skip Section B, and go to line 25	16	42.

Section B

17 Complete all columns below that apply (if you need more space, see instructions):								
(a) Name of state	(b) Taxable wages (as defined in state act)	(c) State experience rate period		(d) State experience rate	(e) Multiply col. (b) by 0.054	(f) Multiply col. (b) by col. (d)	(g) Subtract col. (f) from col. (e). If zero or less, enter -0-	(h) Contributions paid to state unemployment fund
		From	To					
18 Totals							18	
19 Add columns (g) and (h) of line 18					19		20	
20 Total cash wages subject to FUTA tax (see the line 15 instructions)							21	
21 Multiply line 20 by 6.0% (0.06)								
22 Multiply line 20 by 5.4% (0.054)					22			
23 Enter the smaller of line 19 or line 22. (If you paid state unemployment contributions late or you're in a credit reduction state, see instructions and check here)							23	
24 FUTA tax Subtract line 23 from line 21. Enter the result here and go to line 25							24	

Part III	Total Household Employment Taxes
-----------------	---

25	Enter the amount from line 8d. If you checked the "Yes" box on line C of page 1, enter -0-	25	1,366.
26	Add line 16 (or line 24) and line 25	26	1,408.
27	Are you required to file Form 1040?		

Part IV	Address and Signature - Complete this part only if required. See the line 27 instructions.
----------------	--

Part IV Address and Signature Complete this part only if required. See lines 27 instructions. Address (number and street) or P.O. box if mail isn't delivered to street address		Apt., room, or suite no.
City, town or post office, state, and ZIP code		

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Employer's signature		Date	
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Check ☐ if self-employed PTIN
	Firm's name		Firm's EIN
	Firm's address		Phone no.

Nondeductible IRAsGo to www.irs.gov/Form8606 for instructions and the latest information.

Attach to 2022 Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file 2022 Form 8606. See instructions.

RAFAEL E. MARTINEZ

Your social security number

Apt. no.

Fill in Your Address
Only if You Are
Filing This Form by
Itself and Not With
Your Tax Return

Home address (number and street, or P.O. box if mail is not delivered to your home)

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below.

Foreign country name

Foreign province/state/county

Foreign postal code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2022.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2022 and you made nondeductible contributions to a traditional IRA in 2022 or an earlier year. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022 and you made nondeductible contributions to a traditional IRA in 2022 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2022, including those made for 2022 from January 1, 2023, through April 18, 2023. See instructions	1	7,000.
2	Enter your total basis in traditional IRAs. See instructions	2	718.
3	Add lines 1 and 2	3	7,718.
In 2022, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? ☐ No Enter the amount from line 3 on line 14. Do not complete the rest of Part I. ☐ Yes Go to line 4.			
4	Enter those contributions included on line 1 that were made from January 1, 2023, through April 18, 2023	4	
5	Subtract line 4 from line 3	5	
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2022, plus any outstanding rollovers. Subtract certain repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instr.)	6	
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2022. Do not include rollovers (other than repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7	
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022. Also, enter this amount on line 16	8	
9	Add lines 6, 7, and 8	9	
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	x
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also, enter this amount on line 17	11	
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2022 and earlier years	14	7,718.
15a	Subtract line 12 from line 7	15a	
b	Enter the amount on line 15a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 18, as applicable (see instructions)	15b	
c	Taxable amount. Subtract line 15b from line 15a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	15c	

Note: You may be subject to an additional 10% tax on the amount on line 15c if you were under age 59 1/2 at the time of the distribution. See instructions.

Part II 2022 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2022.

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022	16
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17
18	Taxable amount. Subtract line 17 from line 16. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	18

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2022. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution (from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2022, including any qualified first-time homebuyer distributions, and any qualified disaster distributions from 2022 Form(s) 8915-F (see instructions)	19
20	Qualified first-time homebuyer expenses (see instructions). Do not enter more than \$10,000 reduced by the total of all your prior qualified first-time homebuyer distributions	20
21	Subtract line 20 from line 19. If zero or less, enter -0-	21
22	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, stop here	22
23	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions)	23
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA. See instructions	24
25 a	Subtract line 24 from line 23. If zero or less, enter -0- and skip lines 25b and 25c	25a
b	Enter the amount on line 25a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 19, as applicable (see instructions)	25b
c	Taxable amount. Subtract line 25b from line 25a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	25c

Sign Here Only if You Are Filing This Form by Itself and Not With Your Tax Return

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

Paid Preparer Use Only	Your signature		Date	
	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed PTIN
	Firm's name		Firm's EIN	
	Firm's address		Phone no.	

Nondeductible IRAsGo to www.irs.gov/Form8606 for instructions and the latest information.

Attach to 2022 Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2022Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file 2022 Form 8606. See instructions.

REBECCA E. MARTINEZ

Your social security number

**Fill in Your Address
Only if You Are
Filing This Form by
Itself and Not With
Your Tax Return**

Home address (number and street, or P.O. box if mail is not delivered to your home)

Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below.

Foreign country name

Foreign province/state/county

Foreign postal code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2022.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2022 **and** you made nondeductible contributions to a traditional IRA in 2022 or an earlier year. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022 **and** you made nondeductible contributions to a traditional IRA in 2022 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2022, including those made for 2022 from January 1, 2023, through April 18, 2023. See instructions	1	7,000.
2	Enter your total basis in traditional IRAs. See instructions	2	718.
3	Add lines 1 and 2	3	7,718.
In 2022, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? ☐ No Enter the amount from line 3 on line 14. Do not complete the rest of Part I. ☐ Yes Go to line 4.			
4	Enter those contributions included on line 1 that were made from January 1, 2023, through April 18, 2023	4	
5	Subtract line 4 from line 3	5	
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2022, plus any outstanding rollovers. Subtract certain repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instr.)	6	
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2022. Do not include rollovers (other than repayments of qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions)), qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7	
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022. Also, enter this amount on line 16	8	
9	Add lines 6, 7, and 8	9	
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	x
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also, enter this amount on line 17	11	
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12	
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions	13	
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2022 and earlier years	14	7,718.
15a	Subtract line 12 from line 7	15a	
b	Enter the amount on line 15a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 18, as applicable (see instructions)	15b	
c	Taxable amount. Subtract line 15b from line 15a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	15c	
Note: You may be subject to an additional 10% tax on the amount on line 15c if you were under age 59 1/2 at the time of the distribution. See instructions.			

Part II 2022 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2022.

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2022	16	
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	
18	Taxable amount. Subtract line 17 from line 16. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	18	

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2022. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution (from 2022 Form(s) 8915-F (see instructions)), qualified charitable distribution, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2022, including any qualified first-time homebuyer distributions, and any qualified disaster distributions from 2022 Form(s) 8915-F (see instructions)	19	
20	Qualified first-time homebuyer expenses (see instructions). Do not enter more than \$10,000 reduced by the total of all your prior qualified first-time homebuyer distributions	20	
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	
22	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, stop here	22	
23	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions)	23	
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA. See instructions	24	
25a	Subtract line 24 from line 23. If zero or less, enter -0- and skip lines 25b and 25c	25a	
b	Enter the amount on line 25a attributable to qualified disaster distributions, if any, from 2022 Form(s) 8915-F (see instructions). Also, enter this amount on 2022 Form(s) 8915-F, line 19, as applicable (see instructions)	25b	
c	Taxable amount. Subtract line 25b from line 25a. If more than zero, also include this amount on 2022 Form 1040, 1040-SR, or 1040-NR, line 4b	25c	

Sign Here Only if You Are Filing This Form by Itself and Not With Your Tax Return

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

Paid Preparer Use Only	Your signature		Date	Check ☐ if self-employed	PTIN
	Print/Type preparer's name	Preparer's signature	Date		
	Firm's name	Firm's EIN			
	Firm's address		Phone no.		

Qualified Business Income Deduction

OMB No. 1545-2994

2022Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on return

Your taxpayer identification number

RAFAEL E. & REBECCA E. MARTINEZ

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

Use this form if your taxable income, before your qualified business income deduction, is above \$170,050 (\$340,100 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

Part I Trade, Business, or Aggregation Information

Complete Schedules A, B, and/or C (Form 8995-A), as applicable, before starting Part I. Attach additional worksheets when needed. See instructions.

1	(a) Trade, business, or aggregation name	(b) Check if specified service	(c) Check if aggregation	(d) Taxpayer identification number	(e) Check if patron
A		☐	☐		☐
B		☐	☐		☐
C		☐	☐		☐

Part II Determine Your Adjusted Qualified Business Income

	A	B	C
2 Qualified business income from the trade, business, or aggregation. See instructions	2		
3 Multiply line 2 by 20% (0.20). If your taxable income is \$170,500 or less (\$340,100 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	3		
4 Allocable share of W-2 wages from the trade, business, or aggregation	4		
5 Multiply line 4 by 50% (0.50)	5		
6 Multiply line 4 by 25% (0.25)	6		
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	7		
8 Multiply line 7 by 2.5% (0.025)	8		
9 Add lines 6 and 8	9		
10 Enter the greater of line 5 or line 9	10		
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	11		
12 Phased-in reduction. Enter the amount from line 26, if any	12		
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	13		
14 Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions	14		
15 Qualified business income component. Subtract line 14 from line 13	15		
16 Total qualified business income component. Add all amounts reported on line 15	16		

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

Form **8995-A** (2022)

Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$170,050 but not \$220,050 (\$340,100 and \$440,100 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

		A	B	C
17	Enter the amounts from line 3	17		
18	Enter the amounts from line 10	18		
19	Subtract line 18 from line 17	19		
20	Taxable income before qualified business income deduction	20		
21	Threshold. Enter \$170,050 (\$340,100 if married filing jointly)	21		
22	Subtract line 21 from line 20	22		
23	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	23		
24	Phase-in percentage. Divide line 22 by line 23	24		
25	Total phase-in reduction. Multiply line 19 by line 24	25		
26	Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business	26		

Part IV Determine Your Qualified Business Income Deduction

27	Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16	27		
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions SEE STATEMENT 22	28	130.	
29	Qualified REIT dividends and PTP (loss) carryforward from prior years	29	()	
30	Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0-	30	130.	
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	26.	
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		26.
33	Taxable income before qualified business income deduction	33	711,427.	
34	Net capital gain. See instructions	34	40,948.	
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		670,479.
36	Income limitation. Multiply line 35 by 20% (0.20)	36		134,096.
37	Qualified business income deduction before the domestic production activities deduction (DPAD) under section 199A(g). Enter the smaller of line 32 or line 36	37		26.
38	DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don't enter more than line 33 minus line 37	38		
39	Total qualified business income deduction. Add lines 37 and 38	39		26.
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40	()	

Form 8995-A (2022)

SCHEDULE C
(Form 8995-A)(Rev. December 2022)
Department of the Treasury
Internal Revenue Service**Loss Netting and Carryforward**

Attach to Form 8995-A.

Go to www.irs.gov/Form8995A for instructions and the latest information.

OMB No. 1545-2294

Attachment
Sequence No. **55D**

Name(s) shown on return

RAFAEL E. & REBECCA E. MARTINEZ

Your taxpayer identification number

If you have more than three trades, businesses, or aggregations, complete and attach as many Schedules C as needed. See instructions.

1	Trade, business, or aggregation name	(a) Qualified business income/(loss)	(b) Reduction for loss netting (see instructions)	(c) Adjusted qualified business income (Combine (a) and (b). If zero or less, enter -0-.)
	SEE STATEMENT 23		()	
			()	
			()	
2	Qualified business net (loss) carryforward from prior years. See instructions		2	()
3	Total of the trades, businesses, or aggregations losses. Combine the negative amounts on lines 1, column (a), and 2 for all trades, businesses, or aggregations		3	32,267.
4	Total of the trades, businesses, or aggregations income. Add the positive amounts on line 1, column (a), for all trades, businesses, or aggregations		4	1,867.
5	Losses netted with income of other trades, businesses, or aggregations. Enter in the parentheses on line 5 the smaller of the absolute value of line 3 or line 4. Allocate this amount to each of the trades, businesses, or aggregations on line 1, column (b).		5	(1,867.)
6	Qualified business net (loss) carryforward. Subtract line 5 from line 3. If zero or more, enter -0-		6	(30,400.)

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

Schedule C (Form 8995-A) (Rev. 12-2022)

Additional Medicare Tax

If any line does not apply to you, leave it blank. See separate instructions.

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

Go to www.irs.gov/Form8959 for instructions and the latest information.**2022**Attachment
Sequence No. 71

Name(s) shown on return

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	289,000.	
2	Unreported tips from Form 4137, line 6	2		
3	Wages from Form 8919, line 6	3		
4	Add lines 1 through 3	4	289,000.	
5	Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying surviving spouse \$200,000	5	250,000.	
6	Subtract line 5 from line 4. If zero or less, enter -0-	6		39,000.
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II	7		351.

Part II Additional Medicare Tax on Self-Employment Income

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

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

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

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-PR or 1040-SS filers, see instructions), and go to Part V	18		351.
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Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	4,992.	
20	Enter the amount from line 1	20	289,000.	
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	4,191.	
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		801.
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-PR or 1040-SS filers, see instructions)	24		801.

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

OMB No 1545-2227

2022Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on your tax return

RAFAEL E. & REBECCA E. MARTINEZ

Your social security number or EIN

- 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	1,582.
2	Ordinary dividends (see instructions)	2	27,228.
3	Annuities (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a	490,755.
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions) STATEMENT 24	4b	-491,802.
c	Combine lines 4a and 4b	4c	-1,047.
5a	Net gain or loss from disposition of property (see instructions)	5a	23,991.
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	23,991.
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	51,754.

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	51,754.
13	Modified adjusted gross income (see instructions)	13	847,501.
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	597,501.
16	Enter the smaller of line 12 or line 15	16	51,754.
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	1,967.
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	

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

Form **8960** (2022)

[illegible]

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total					

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
	SEE ATTACHED	STATEMENT FOR PART VII		
Total		32,331.	1.000000000	29,417.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
	SEE ATTACHED	STATEMENT FOR PART VIII		
Total		32,331.	29,417.	2,914.

ALTERNATIVE MINIMUM TAX

Passive Activity Loss Limitations

See separate instructions.
Attach to Form 1040, 1040-SR, or 1041.
Go to www.irs.gov/Form8582 for instructions and the latest information.

OMB No. 1545-1008

2022

Attachment
Sequence No. **858**

Name(s) shown on return

Identifying number

RAFAEL E. & REBECCA E. MARTINEZ

Part I 2022 Passive Activity Loss

Caution: Complete Parts IV and V before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation, see *Special Allowance for Rental Real Estate Activities* in the instructions.)

1a Activities with net income (enter the amount from Part IV, column (a))	1a	_____
b Activities with net loss (enter the amount from Part IV, column (b))	1b	(_____)
c Prior years' unallowed losses (enter the amount from Part IV, column (c))	1c	(_____)
d Combine lines 1a, 1b, and 1c		_____

1d

All Other Passive Activities

2a Activities with net income (enter the amount from Part V, column (a))	2a	2,914
b Activities with net loss (enter the amount from Part V, column (b))	2b	(32,331)
c Prior years' unallowed losses (enter the amount from Part V, column (c))	2c	(
d Combine lines 2a , 2b , and 2c		

2d

-29,417.

3 Combine lines 1d and 2d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c or 2c. Report the losses on the forms and schedules normally used

3

-29,417.

If line 3 is a loss and:

- Line 1d is a loss, go to Part II.
- Line 2d is a loss (and line 1d is zero or more), skip Part II and go to line 10.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, **do not** complete Part II. Instead, go to line 10.

Part II Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

4	Enter the smaller of the loss on line 1d or the loss on line 3	
5	Enter \$150,000. If married filing separately, see instructions	5
6	Enter modified adjusted gross income, but not less than zero. See instructions Note: If line 6 is greater than or equal to line 5, skip lines 7 and 8 and enter -0- on line 9. Otherwise, go to line 7.	6
7	Subtract line 6 from line 5	7
8	Multiply line 7 by 50% (0.50). Do not enter more than \$25,000. If married filing separately, see instructions	
9	Enter the smaller of line 4 or line 8	

4

8

9

Part II Total Losses Allowed

10	Add the income, if any, on lines 1a and 2a and enter the total	10	2,914.
11	Total losses allowed from all passive activities for 2022. Add lines 9 and 10. See instructions to find out how to report the losses on your tax return	11	2,914.

10

2,914.

11

2,914.

Part IV Complete This Part Before Part I, Lines 1a, 1b, and 1c. See instructions.

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
Total. Enter on Part I, lines 1a, 1b, and 1c					

Total. Enter on Part I, lines 1a, 1b, and 1c ...

LHA For Paperwork Reduction Act Notice, see instructions.

Form 8582 (2022)

Form 8582 (2022) **RAFAEL E. & REBECCA E. MARTINEZ**

Page 2

[illegible]

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total					

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
	SEE ATTACHED	STATEMENT FOR PART VII		
Total		32,331.	1.000000000	29,417.

Part VIII Allowable losses (see instructions).				
Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
	SEE ATTACHED STATEMENT FOR PART VIII			
Total		32,331.	29,417.	2,914.

Form 8582 (2022)

Noncash Charitable Contributions

Attach one or more Forms 8283 to your tax return if you claimed a total deduction
of over \$500 for all contributed property.

Go to www.irs.gov/Form8283 for instructions and the latest information.

Name(s) shown on your income tax return

Identifying number

RAFAEL E. & REBECCA E. MARTINEZ

Note: Figure the amount of your contribution deduction before completing this form. See your tax return instructions.

Section A. Donated Property of \$5,000 or Less and Publicly Traded Securities - List in this section only an item
(or a group of similar items) for which you claimed a deduction of \$5,000 or less. Also list publicly traded
securities and certain other property even if the deduction is more than \$5,000. See instructions.

Part I Information on Donated Property - If you need more space, attach a statement.

1	(a) Name and address of the donee organization	(b) If donated property is a vehicle, check the box. Also enter the vehicle identification number (unless Form 1098-C is attached)	(c) Description and condition of donated property (For a vehicle, enter the year, make, model, and mileage. For securities and other property, see instructions.)
A	THE GENEVA SCHOOL INC 2025 ST, WINTER PARK, FL 32792	☐	ITEMS TO BE AUCTIONED; LIQUOR & BLANKETS
B	NATIONAL CHRISTIAN FOUNDATION 15 NORTH EO, ORLANDO, FL 32801	☐	921 SH AMER NEW PERSPECTIVE FUND CLF-2
C	NATIONAL CHRISTIAN FOUNDATION 15 NORTH EO, ORLANDO, FL 32801	☐	142 SH ISHARES S&P SMALL CAP 600 INDEX FUND
D	NATIONAL CHRISTIAN FOUNDATION 15 NORTH EO, ORLANDO, FL 32801	☐	196SH TRUIST, 35SH WASH MUTUAL, 891.725SH AMER MU
E		☐	

Note: If the amount you claimed as a deduction for an item is \$500 or less, you do not have to complete columns (e), (f), and (g).

	(d) Date of the contribution	(e) Date acquired by donor (mo., yr.)	(f) How acquired by donor	(g) Donor's cost or adjusted basis	(h) Fair market value (see instructions)	(i) Method used to determine the fair market value
A	03/26/22	03/22	PURCHASE	451.	451.	NEWLY PURCHASED PRICE
B	03/18/22	VAR.	PURCHASE			NYSE
C	12/22/22	VAR.	PURCHASE			NYSE
D	12/28/22	VAR.	PURCHASE			NYSE
E						

Section B. Donated Property Over \$5,000 (Except Publicly Traded Securities, Vehicles, Intellectual Property or Inventory Reportable in Section A) - Complete this section for one item (or a group of similar items) for which you claimed a deduction of more than \$5,000 per item or group (except contributions reportable in Section A). Provide a separate form for each item donated unless it is part of a group of similar items. A qualified appraisal is generally required for items reportable in Section B. See instructions.

Part I Information on Donated Property

2 Check the box that describes the type of property donated.

- | | | |
|--|--|---|
| a ☐ Art* (contribution of \$20,000 or more) | e ☐ Other Real Estate | i ☐ Vehicles |
| b ☐ Qualified Conservation Contribution | f ☐ Securities | j ☐ Clothing and household items |
| c ☐ Equipment | g ☐ Collectibles** | k ☐ Other |
| d ☐ Art* (contribution of less than \$20,000) | h ☐ Intellectual Property | |

*Art includes paintings, sculptures, watercolors, prints, drawings, ceramics, antiques, decorative arts, textiles, carpets, silver, rare manuscripts, historical memorabilia, and other similar objects.

**Collectibles include coins, stamps, books, gems, jewelry, sports memorabilia, dolls, etc., but not art as defined above.

Note: In certain cases, you must attach a qualified appraisal of the property. See instructions.

Note: In certain cases, you must attach a qualified appraisal of the property. See instructions.						
3		(a) Description of donated property (if you need more space, attach a separate statement)		(b) If any tangible personal property or real property was donated, give a brief summary of the overall physical condition of the property at the time of the gift		(c) Appraised fair market value
A						
B						
C						
	(d) Date acquired by donor (mo., yr.)	(e) How acquired by donor	(f) Donor's cost or adjusted basis	(g) For bargain sales, enter amount received	(h) Amount claimed as a deduction (see instructions)	(i) Date of contribution (see instructions)
A						
B						
C						

**S Corporation Shareholder Stock and
Debt Basis Limitations**

Attach to your tax return.

Go to www.irs.gov/Form7203 for instructions and the latest information.

OMB No. 1545-2302

Attachment
Sequence No. **203**

Name of shareholder

RAFAEL E. MARTINEZ

Identifying number

A Name of S corporation

MCEWAN, MARTINEZ., DUKES & HALL P.A.

B Employer identification number

59-2668632

C Stock block (see instructions):

D Check applicable box(es) to indicate how stock was acquired:

(1) ☐ Original shareholder (2) ☐ Purchased (3) ☐ Inherited (4) ☐ Gift (5) ☐ Other:E Check if you have a Regulations section 1.1367-1(g) election in effect during the tax year for this S corporation ☐**Part I Shareholder Stock Basis**

1	Stock basis at the beginning of the corporation's tax year	1	103,514.
2	Basis from any capital contributions made or additional stock acquired during the tax year	2	
3a	Ordinary business income (enter losses in Part III)	3a	423,046.
b	Net rental real estate income (enter losses in Part III)	3b	
c	Other net rental income (enter losses in Part III)	3c	
d	Interest income	3d	253.
e	Ordinary dividends	3e	
f	Royalties	3f	
g	Net capital gains (enter losses in Part III)	3g	
h	Net section 1231 gain (enter losses in Part III)	3h	
i	Other income (enter losses in Part III)	3i	
j	Excess depletion adjustment	3j	
k	Tax-exempt income	3k	
l	Recapture of business credits	3l	
m	Other items that increase stock basis	3m	
4	Add lines 3a through 3m	4	423,299.
5	Stock basis before distributions. Add lines 1, 2, and 4	5	526,813.
6	Distributions (excluding dividend distributions)	6	345,926.
Note: If line 6 is larger than line 5, subtract line 5 from line 6 and report the result as a capital gain on Form 8949 and Schedule D. See instructions.			
7	Stock basis after distributions. Subtract line 6 from line 5. If the result is zero or less, enter -0-, skip lines 8 through 14, and enter -0- on line 15	7	180,887.
8a	Nondeductible expenses	8a	35,403.
b	Depletion for oil and gas	8b	
c	Business credits (sections 50(c)(1) and (5))	8c	
9	Add lines 8a through 8c	9	35,403.
10	Stock basis before loss and deduction items. Subtract line 9 from line 7. If the result is zero or less, enter -0-, skip lines 11 through 14, and enter -0- on line 15	10	145,484.
11	Allowable loss and deduction items. Enter the amount from line 47, column (c)	11	453.
12	Debt basis restoration (see net increase in instructions for line 23)	12	
13	Other items that decrease stock basis	13	
14	Add lines 11, 12, and 13	14	453.
15	Stock basis at the end of the corporation's tax year. Subtract line 14 from line 10. If the result is zero or less, enter -0-	15	145,031.

Part II Shareholder Debt Basis**Section A - Amount of Debt** (If more than three debts, see instructions.)

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	
16 Loan balance at the beginning of the corporation's tax year				
17 Additional loans (see instructions)				
18 Loan balance before repayment. Add lines 16 and 17				
19 Principal portion of debt repayment (this line doesn't include interest)	()	()	()	()
20 Loan balance at the end of the corporation's tax year. Subtract line 19 from line 18				

Part II Shareholder Debt Basis (continued)**Section B - Adjustments to Debt Basis**

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
21 Debt basis at the beginning of the corporation's tax year				
22 Enter the amount, if any, from line 17				
23 Debt basis restoration (see instructions)				
24 Debt basis before repayment. Add lines 21, 22, and 23				
25 Divide line 24 by line 18				
26 Nontaxable debt repayment. Multiply line 25 by line 19				
27 Debt basis before nondeductible expenses and losses. Subtract line 26 from line 24				
28 Nondeductible expenses and oil and gas depletion deductions in excess of stock basis				
29 Debt basis before losses and deductions. Subtract line 28 from line 27. If the result is zero or less, enter -0-				
30 Allowable losses in excess of stock basis. Enter the amount from line 47, column (d)				
31 Debt basis at the end of the corporation's tax year. Subtract line 30 from line 29. If the result is zero or less, enter -0-				

Section C - Gain on Loan Repayment

32 Repayment. Enter the amount from line 19				
33 Nontaxable repayments. Enter the amount from line 26				
34 Reportable gain. Subtract line 33 from line 32				

Part III Shareholder Allowable Loss and Deduction Items

Description	(a) Current year losses and deductions	(b) Carryover amounts (column (e)) from the previous year	(c) Allowable loss from stock basis	(d) Allowable loss from debt basis	(e) Carryover amounts
35 Ordinary business loss					
36 Net rental real estate loss					
37 Other net rental loss					
38 Net capital loss					
39 Net section 1231 loss					
40 Other loss					
41 Section 179 deductions					
42 Charitable contributions	453.		453.		
43 Investment interest expense					
44 Section 59(e)(2) expenditures					
45 Other deductions					
46 Foreign taxes paid or accrued					
47 Total loss. Add lines 35 through 46 for each column. Enter the total loss in column (c) on line 11 and enter the total loss in column (d) on line 30	453.		453.		

ALTERNATIVE MINIMUM TAX
S Corporation Shareholder Stock and
Debt Basis Limitations

Attach to your tax return.

Go to www.irs.gov/Form7203 for instructions and the latest information.

OMB No. 1545-2302

Attachment
Sequence No. 203

Name of shareholder

RAFAEL E. MARTINEZ

Identifying number

A Name of S corporation

MCEWAN, MARTINEZ., DUKES & HALL P.A.

B Employer identification number

59-2668632

C Stock block (see instructions):

D Check applicable box(es) to indicate how stock was acquired:

(1) ☐ Original shareholder (2) ☐ Purchased (3) ☐ Inherited (4) ☐ Gift (5) ☐ Other:E Check if you have a Regulations section 1.1367-1(g) election in effect during the tax year for this S corporation ☐

Part I Shareholder Stock Basis

1	Stock basis at the beginning of the corporation's tax year	1	103,514.
2	Basis from any capital contributions made or additional stock acquired during the tax year	2	
3a	Ordinary business income (enter losses in Part III)	3a	423,046.
b	Net rental real estate income (enter losses in Part III)	3b	
c	Other net rental income (enter losses in Part III)	3c	
d	Interest income	3d	253.
e	Ordinary dividends	3e	
f	Royalties	3f	
g	Net capital gains (enter losses in Part III)	3g	
h	Net section 1231 gain (enter losses in Part III)	3h	
i	Other income (enter losses in Part III)	3i	
j	Excess depletion adjustment	3j	
k	Tax-exempt income	3k	
l	Recapture of business credits	3l	
m	Other items that increase stock basis	3m	
4	Add lines 3a through 3m	4	423,299.
5	Stock basis before distributions. Add lines 1, 2, and 4	5	526,813.
6	Distributions (excluding dividend distributions) Note: If line 6 is larger than line 5, subtract line 5 from line 6 and report the result as a capital gain on Form 8949 and Schedule D. See instructions.	6	345,926.
7	Stock basis after distributions. Subtract line 6 from line 5. If the result is zero or less, enter -0-, skip lines 8 through 14, and enter -0- on line 15	7	180,887.
8a	Non deductible expenses	8a	35,403.
b	Depletion for oil and gas	8b	
c	Business credits (sections 50(c)(1) and (5))	8c	
9	Add lines 8a through 8c	9	35,403.
10	Stock basis before loss and deduction items. Subtract line 9 from line 7. If the result is zero or less, enter -0-, skip lines 11 through 14, and enter -0- on line 15	10	145,484.
11	Allowable loss and deduction items. Enter the amount from line 47, column (c)	11	453.
12	Debt basis restoration (see net increase in instructions for line 23)	12	
13	Other items that decrease stock basis	13	
14	Add lines 11, 12, and 13	14	453.
15	Stock basis at the end of the corporation's tax year. Subtract line 14 from line 10. If the result is zero or less, enter -0-	15	145,031.

Part II Shareholder Debt Basis

Section A - Amount of Debt (If more than three debts, see instructions.)

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	☐ Formal note ☐ Open account	
16 Loan balance at the beginning of the corporation's tax year				
17 Additional loans (see instructions)				
18 Loan balance before repayment. Add lines 16 and 17				
19 Principal portion of debt repayment (this line doesn't include interest)	()	()	()	()
20 Loan balance at the end of the corporation's tax year. Subtract line 19 from line 18				

Part II Shareholder Debt Basis (continued)**Section B - Adjustments to Debt Basis**

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
21 Debt basis at the beginning of the corporation's tax year				
22 Enter the amount, if any, from line 17				
23 Debt basis restoration (see instructions)				
24 Debt basis before repayment. Add lines 21, 22, and 23				
25 Divide line 24 by line 18				
26 Nontaxable debt repayment. Multiply line 25 by line 19				
27 Debt basis before nondeductible expenses and losses. Subtract line 26 from line 24				
28 Nondeductible expenses and oil and gas depletion deductions in excess of stock basis				
29 Debt basis before losses and deductions. Subtract line 28 from line 27. If the result is zero or less, enter -0-				
30 Allowable losses in excess of stock basis. Enter the amount from line 47, column (d)				
31 Debt basis at the end of the corporation's tax year. Subtract line 30 from line 29. If the result is zero or less, enter -0-				

Section C - Gain on Loan Repayment

32 Repayment. Enter the amount from line 19				
33 Nontaxable repayments. Enter the amount from line 26				
34 Reportable gain. Subtract line 33 from line 32				

Part III Shareholder Allowable Loss and Deduction Items

Description	(a) Current year losses and deductions	(b) Carryover amounts (column (e)) from the previous year	(c) Allowable loss from stock basis	(d) Allowable loss from debt basis	(e) Carryover amounts
35 Ordinary business loss					
36 Net rental real estate loss					
37 Other net rental loss					
38 Net capital loss					
39 Net section 1231 loss					
40 Other loss					
41 Section 179 deductions					
42 Charitable contributions	453.		453.		
43 Investment interest expense					
44 Section 59(e)(2) expenditures					
45 Other deductions					
46 Foreign taxes paid or accrued					
47 Total loss. Add lines 35 through 46 for each column. Enter the total loss in column (c) on line 11 and enter the total loss in column (d) on line 30	453.		453.		

INDIVIDUAL RETIREMENT ACCOUNT COMPUTATION FOR FEDERAL 1040

Name: RAFAEL E. MARTINEZ

SSN: XXXXXXXXXX

Traditional IRA Deduction Computation

Covered by an employer retirement plan?

☒ Yes

☐ No

1	Traditional IRA limitation	7,000.	
2	Less: Amount contributed to Roth IRA	0.	
3	Net traditional IRA amount		7,000.
4	Wages and other earned income after Keogh deduction	281,801.	
5	Enter foreign housing and earned income exclusion		
6	Net compensation (line 4 minus line 5)		281,801.
7	Amount contributed to traditional IRA		7,000.
8	Allowable contribution (lesser of line 3, line 6 or line 7)		7,000.
9	Contribution credit:		
a	IRA limitation		
b	IRA contributions from line 7		
c	Contribution credit, line 9a minus line 9b		
d	Prior year excess contribution not previously eliminated		
e	Additional allowable contribution (lesser of line 9c or line 9d)		
10	Total allowable contribution, line 8 plus line 9e		7,000.
11	Excess Contribution		
12	Limitation Reduction:		
a	Traditional IRA limitation	7,000.	
b	Adjusted gross income before traditional IRA deduction	847,501.	
c	Phaseout level	109,000.	
d	Excess AGI, line 12b minus line 12c	738,501.	
e	Reduction ratio, line 12d divided by \$10,000 or \$20,000	100.00%	
f	Amount of limitation reduction, line 12a times line 12e (round down to previous \$10)	7,000.	
g	Reduced limitation, line 12a minus line 12f. Not less than \$200 if ratio under 100%		0.
13	Traditional IRA deduction, lesser of line 10 or line 12g		0.

Roth IRA Contribution Computation

1	Roth IRA limitation		
2	Amount contributed to traditional IRA		
3	Net Roth IRA limitation		
4	Wages and other earned income after Keogh deduction and foreign earned income exclusion		
5	Amount contributed to Roth IRA		
6	Allowable Roth IRA contribution before AGI limitation (lesser of line 3, 4 or 5)		
7	Limitation Reduction:		
a	Modified AGI for Roth IRA purposes		
b	Phaseout level		
c	Excess AGI, line 7a minus line 7b		
d	Reduction ratio, line 7c divided by \$10,000 or \$15,000		
e	Amount of limitation reduction, line 1 times line 7d (round down to previous \$10)		
8	Roth IRA contribution (lesser of line 1 minus line 7e or line 6). Not less than \$200 if ratio under 100%		

INDIVIDUAL RETIREMENT ACCOUNT COMPUTATION FOR FEDERAL 1040

Name: REBECCA E. MARTINEZ

SSN: XXXXXXXXXX

Traditional IRA Deduction Computation

Covered by an employer retirement plan?

☐ Yes ☒ No

1	Traditional IRA limitation	7,000.	
2	Less: Amount contributed to Roth IRA	0.	
3	Net traditional IRA amount		7,000.
4	Wages and other earned income after Keogh deduction	281,801.	
5	Enter foreign housing and earned income exclusion		
6	Net compensation (line 4 minus line 5)		281,801.
7	Amount contributed to traditional IRA		7,000.
8	Allowable contribution (lesser of line 3, line 6 or line 7)		7,000.
9	Contribution credit:		
a	IRA limitation		
b	IRA contributions from line 7		
c	Contribution credit, line 9a minus line 9b		
d	Prior year excess contribution not previously eliminated		
e	Additional allowable contribution (lesser of line 9c or line 9d)		
10	Total allowable contribution, line 8 plus line 9e		7,000.
11	Excess Contribution		
12	Limitation Reduction:		
a	Traditional IRA limitation	7,000.	
b	Adjusted gross income before traditional IRA deduction	847,501.	
c	Phaseout level	204,000.	
d	Excess AGI, line 12b minus line 12c	643,501.	
e	Reduction ratio, line 12d divided by \$10,000 or \$20,000	100.00%	
f	Amount of limitation reduction, line 12a times line 12e (round down to previous \$10)	7,000.	
g	Reduced limitation, line 12a minus line 12f. Not less than \$200 if ratio under 100%		0.
13	Traditional IRA deduction, lesser of line 10 or line 12g		0.

Roth IRA Contribution Computation

1	Roth IRA limitation		
2	Amount contributed to traditional IRA		
3	Net Roth IRA limitation		
4	Wages and other earned income after Keogh deduction and foreign earned income exclusion		
5	Amount contributed to Roth IRA		
6	Allowable Roth IRA contribution before AGI limitation (lesser of line 3, 4 or 5)		
7	Limitation Reduction:		
a	Modified AGI for Roth IRA purposes		
b	Phaseout level		
c	Excess AGI, line 7a minus line 7b		
d	Reduction ratio, line 7c divided by \$10,000 or \$15,000		
e	Amount of limitation reduction, line 1 times line 7d (round down to previous \$10)		
8	Roth IRA contribution (lesser of line 1 minus line 7e or line 6). Not less than \$200 if ratio under 100%		

IRA - Modified AGI for Computing Traditional IRA Deduction

1. Adjusted gross income (AGI) from Form 1040 (not taking into account any social security benefits, any deduction for contributions to a traditional IRA, any student loan interest deduction, or any exclusion of interest from savings bonds to be reported on Form 8815)	805,556.
2. Fifty percent of all social security benefits received	24,674.
3. Total of any foreign earned income exclusion, foreign housing exclusion, U.S. possessions income exclusion, exclusion of income from Puerto Rico claimed as a bona fide resident of Puerto Rico, or exclusion of employer-provided adoption benefits	
4. Total amount of any tax-exempt interest reported on line 2a of Form 1040	3,893.
5. Total of lines 1, 2, 3, and 4	834,123.
6. Base amount listed below for your filing status	32,000.
* \$25,000 if single, head of household, surviving spouse, or married filing separately and lived apart from spouse during the entire year; * \$32,000 if married filing jointly; * \$-0- if married filing separately and lived with spouse at any time during the year	
7. Line 5 minus line 6. If zero or less, enter zero	802,123.
8. 50% of the amount between \$25,000 and \$34,000 (\$32,000 and \$44,000 if MFJ; \$0 if MFS and you lived with spouse at any time during the year). Limited to line 2 above	6,000.
9. 85% of the amount over \$34,000 (\$44,000 if MFJ; \$0 if MFS and lived with spouse at any time during the year).	671,605.
10. 85% of all social security benefits received	41,945.
11. Taxable social security benefits to be included in modified AGI for traditional IRA deduction purposes. Enter the lesser of line 8 plus line 9 or line 10. Plus any lump sum payments	41,945.
12. Enter the amount of any employer-provided adoption benefits exclusion and any foreign earned income exclusion and foreign housing exclusion or deduction claimed	
13. Modified AGI for determining reduced Traditional IRA deduction - add lines 1, 11 and 12	847,501.

Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership

(Keep for your records.)

Name of Entity: **MCEWAN-EDWARDS BUILDING, LLC**

EIN: **20-4590532**

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.

Enter -0- if this is your first tax year 1. 236,578.

Increases:

2. Money and your adjusted basis in property contributed to the partnership less the associated liabilities (but not less than zero) 2. _____

3. Your increased share of or assumption of partnership liabilities (Subtract your share of liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership liabilities you assumed during the tax year) (but not less than zero) 3. _____

4. Your share of the partnership's income or gain (including tax-exempt income) reduced by any amount included in interest income with respect to the credit to holders of clean renewable energy bonds 4. 78,378.

5. Any gain recognized this year on contributions of property. Do not include gain from transfer of liabilities 5. _____

6. Your share of the excess of the deductions for depletion (other than oil and gas depletion) over the basis of the property subject to depletion 6. _____

Decreases:

7. Withdrawals and distributions of money and the adjusted basis of property distributed to you from the partnership. Do not include the amount of property distributions included in the partner's income (taxable income) 7. -82,578.

Caution: A distribution may be taxable if the amount exceeds your adjusted basis of your partnership interest immediately before the distribution.

8. Your decreased share of partnership liabilities and any decrease in your individual liabilities because they were assumed by the partnership. (Subtract your share of liabilities shown in Item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021 Schedule K-1 and add the amount of your individual liabilities that the partnership assumed during the tax year (but not less than zero)) 8. _____

9. Your share of the partnership's nondeductible expenses that are not capital expenditures 9. _____

10. Your share of the partnership's losses and deductions (including capital losses). However, include your share of the partnership's section 179 expense deduction for this year even if you cannot deduct all of it because of limitations 10. 9,589.

11. The amount of your deduction for depletion of any partnership oil and gas property, not to exceed your allocable share of the adjusted basis of that property 11. _____

12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6 and subtract lines 7 through 11 from the total. If zero or less, enter -0-) 12. 387,945.

Caution: The deduction for your share of the partnership's losses and deductions is limited to your adjusted basis in your partnership interest. If you entered zero on line 12 and the amount figured for line 12 was less than zero, a portion of your share of the partnership losses and deductions may not be deductible.

Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership

(Keep for your records.)

Name of Entity: CSE OPORTUNITY FUND II LLC

EIN: 84-3718427

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.

Enter -0- if this is your first tax year

1. 92,643.

Increases:

2. Money and your adjusted basis in property contributed to the partnership less the associated liabilities (but not less than zero)

2.

3. Your increased share of or assumption of partnership liabilities (Subtract your share of liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership liabilities you assumed during the tax year) (but not less than zero)

3.

4. Your share of the partnership's income or gain (including tax-exempt income) reduced by any amount included in interest income with respect to the credit to holders of clean renewable energy bonds

4. 2,914.

5. Any gain recognized this year on contributions of property. Do not include gain from transfer of liabilities

5.

6. Your share of the excess of the deductions for depletion (other than oil and gas depletion) over the basis of the property subject to depletion

6.

Decreases:

7. Withdrawals and distributions of money and the adjusted basis of property distributed to you from the partnership. Do not include the amount of property distributions included in the partner's income (taxable income)

7. 33,673.

Caution: A distribution may be taxable if the amount exceeds your adjusted basis of your partnership interest immediately before the distribution.

8. Your decreased share of partnership liabilities and any decrease in your individual liabilities because they were assumed by the partnership. (Subtract your share of liabilities shown in item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021 Schedule K-1 and add the amount of your individual liabilities that the partnership assumed during the tax year (but not less than zero))

8.

9. Your share of the partnership's nondeductible expenses that are not capital expenditures

9.

10. Your share of the partnership's losses and deductions (including capital losses). However, include your share of the partnership's section 179 expense deduction for this year even if you cannot deduct all of it because of limitations

10.

11. The amount of your deduction for depletion of any partnership oil and gas property, not to exceed your allocable share of the adjusted basis of that property

11.

12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6 and subtract lines 7 through 11 from the total. If zero or less, enter -0-.)

12. 61,884.

Caution: The deduction for your share of the partnership's losses and deductions is limited to your adjusted basis in your partnership interest. If you entered zero on line 12 and the amount figured for line 12 was less than zero, a portion of your share of the partnership losses and deductions may not be deductible.

ALTERNATIVE MINIMUM TAX
Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership
(Keep for your records.)

Name of Entity: **MCEWAN-EDWARDS BUILDING, LLC**

EIN: **20-4590532**

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.

Enter -0- if this is your first tax year 1. 236,578.

Increases:

2. Money and your adjusted basis in property contributed to the partnership less the associated liabilities (but not less than zero)

2. 0.

3. Your increased share of or assumption of partnership liabilities (Subtract your share of liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership liabilities you assumed during the tax year) (but not less than zero)

3. _____

4. Your share of the partnership's income or gain (including tax-exempt income) reduced by any amount included in interest income with respect to the credit to holders of clean renewable energy bonds

4. 78,378.

5. Any gain recognized this year on contributions of property. Do not include gain from transfer of liabilities

5. 0.

6. Your share of the excess of the deductions for depletion (other than oil and gas depletion) over the basis of the property subject to depletion

6. _____

Decreases:

7. Withdrawals and distributions of money and the adjusted basis of property distributed to you from the partnership. Do not include the amount of property distributions included in the partner's income (taxable income)

7. -82,578.

Caution: A distribution may be taxable if the amount exceeds your adjusted basis of your partnership interest immediately before the distribution.

8. Your decreased share of partnership liabilities and any decrease in your individual liabilities because they were assumed by the partnership. (Subtract your share of liabilities shown in item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021 Schedule K-1 and add the amount of your individual liabilities that the partnership assumed during the tax year) (but not less than zero)

8. _____

9. Your share of the partnership's nondeductible expenses that are not capital expenditures

9. _____

10. Your share of the partnership's losses and deductions (including capital losses). However, include your share of the partnership's section 179 expense deduction for this year even if you cannot deduct all of it because of limitations

10. 9,734.

11. The amount of your deduction for depletion of any partnership oil and gas property, not to exceed your allocable share of the adjusted basis of that property

11. _____

12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6 and subtract lines 7 through 11 from the total. If zero or less, enter -0-.)

12. 387,800.

Caution: The deduction for your share of the partnership's losses and deductions is limited to your adjusted basis in your partnership interest. If you entered zero on line 12 and the amount figured for line 12 was less than zero, a portion of your share of the partnership losses and deductions may not be deductible.

ALTERNATIVE MINIMUM TAX
Worksheet for Adjusting the Basis of a Partner's Interest in the Partnership
(Keep for your records.)

Name of Entity: **CSE OPORTUNITY FUND II LLC**

EIN: **84-3718427**

1. Your adjusted basis at the end of the prior year. Do not enter less than zero.
Enter -0- if this is your first tax year 1. 92,643.
- Increases:
2. Money and your adjusted basis in property contributed to the partnership less
the associated liabilities (but not less than zero) 2. 0.
3. Your increased share of or assumption of partnership liabilities (Subtract your share of
liabilities shown in Item K of your 2021 Schedule K-1 from your share of liabilities
shown in Item K of your 2022 Schedule K-1 and add the amount of any partnership
liabilities you assumed during the tax year) (but not less than zero) 3. _____
4. Your share of the partnership's income or gain (including tax-exempt income) reduced by
any amount included in interest income with respect to the credit to holders of clean renewable
energy bonds 4. 2,914.
5. Any gain recognized this year on contributions of property. Do not include gain from
transfer of liabilities 5. 0.
6. Your share of the excess of the deductions for depletion (other than oil and gas
depletion) over the basis of the property subject to depletion 6. _____
- Decreases:
7. Withdrawals and distributions of money and the adjusted basis of property distributed
to you from the partnership. Do not include the amount of property distributions
included in the partner's income (taxable income) 7. 33,673.
- Caution:** A distribution may be taxable if the amount exceeds your adjusted basis of
your partnership interest immediately before the distribution.
8. Your decreased share of partnership liabilities and any decrease in your individual liabilities
because they were assumed by the partnership. (Subtract your share of liabilities shown in
item K of your 2022 Schedule K-1 from your share of liabilities shown in item K of your 2021
Schedule K-1 and add the amount of your individual liabilities that the partnership assumed
during the tax year (but not less than zero)) 8. _____
9. Your share of the partnership's nondeductible expenses that are not capital
expenditures 9. _____
10. Your share of the partnership's losses and deductions (including capital losses).
However, include your share of the partnership's section 179 expense deduction for
this year even if you cannot deduct all of it because of limitations 10. _____
11. The amount of your deduction for depletion of any partnership oil and gas property,
not to exceed your allocable share of the adjusted basis of that property 11. _____
12. Your adjusted basis in the partnership at end of this tax year. (Add lines 1 through 6
and subtract lines 7 through 11 from the total. If zero or less, enter -0-) 12. 61,884.

Caution: The deduction for your share of the partnership's losses and deductions is
limited to your adjusted basis in your partnership interest. If you entered zero on line 12
and the amount figured for line 12 was less than zero, a portion of your share of the
partnership losses and deductions may not be deductible.

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 1

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T MCEWAN MARTINEZ AND DUKES	281,801.	96,940.			9,114.	4,992.
TOTALS	281,801.	96,940.			9,114.	4,992.

FORM 1040 TAX-EXEMPT INTEREST STATEMENT 2

NAME OF PAYER	AMOUNT
RAYMOND JAMES & ASSOCIATES, INC.	3,893.
TOTAL TO FORM 1040, LINE 2A	3,893.

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 3

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE	384.	384.
TRUIST FINANCIAL CORPORATION C/O COMPUTERSHARE	25.	25.
RAYMOND JAMES & ASSOCIATES, INC.	4,249.	2,829.
RAYMOND JAMES & ASSOCIATES, INC.	20,109.	13,536.
FROM K-1 - CSE MIXED USE- MULTIFAMILY FUND IV LLC	183.	183.
TOTAL INCLUDED IN FORM 1040, LINE 3A		16,957.

FORM 1040

SOCIAL SECURITY BENEFITS WORKSHEET

STATEMENT 4

CHECK ONLY ONE BOX:

- A. SINGLE, HEAD OF HOUSEHOLD, OR QUALIFYING SURVIVING SPOUSE
- X B. MARRIED FILING JOINTLY
- C. MARRIED FILING SEPARATELY AND LIVED WITH YOUR SPOUSE AT ANY TIME DURING 2022
- D. MARRIED FILING SEPARATELY AND LIVED APART FROM YOUR SPOUSE FOR ALL OF 2022

1. ENTER THE TOTAL AMOUNT FROM BOX 5 OF ALL YOUR FORMS SSA-1099 AND RRB-1099. ALSO, ENTER THIS AMOUNT ON FORM 1040, LINE 6A 49,347.
 IF YOU CHECKED BOX B: TAXPAYER AMOUNT 49,347.
 SPOUSE AMOUNT 24,674.
2. MULTIPLY LINE 1 BY 50% (0.50) 24,674.
3. ADD THE AMOUNTS ON FORM 1040, LINES 1Z, 2A, 2B, 3B, 4B, 5B, 7 AND 8. IF FILING FORM 8815, DON'T INCLUDE THE AMOUNT FROM LINE 2B. INSTEAD, USE THE AMOUNT FROM SCHEDULE B, LINE 2. DO NOT INCLUDE ANY AMOUNTS FROM BOX 5 OF FORMS SSA-1099 OR RRB-1099 829,250.
4. ENTER THE AMOUNT OF ANY EXCLUSIONS FROM FOREIGN EARNED INCOME, FOREIGN HOUSING, INCOME FROM U.S. POSSESSIONS, OR INCOME FROM PUERTO RICO BY BONA FIDE RESIDENTS OF PUERTO RICO THAT YOU CLAIMED
5. ADD LINES 2, 3, AND 4 853,924.
6. ADD THE AMOUNTS FROM SCHEDULE 1, LINES 11 THROUGH 20, AND 23 AND 25 19,801.
7. SUBTRACT LINE 6 FROM LINE 5 834,123.
8. ENTER: 32,000.
 \$25,000 IF YOU CHECKED BOX A OR D, OR
 \$32,000 IF YOU CHECKED BOX B, OR
 \$-0- IF YOU CHECKED BOX C
9. IS THE AMOUNT ON LINE 8 LESS THAN THE AMOUNT ON LINE 7?
 [] NO. STOP. NONE OF YOUR SOCIAL SECURITY BENEFITS ARE TAXABLE. ENTER -0- ON FORM 1040, LINE 6B. IF YOU ARE MARRIED FILING SEPARATELY AND YOU LIVED APART FROM YOUR SPOUSE FOR ALL OF 2022, BE SURE YOU ENTERED 'D' TO THE RIGHT OF THE WORD "BENEFITS" ON LINE 6A.
 [X] YES. SUBTRACT LINE 8 FROM LINE 7 802,123.
10. ENTER \$9,000 IF YOU CHECKED BOX A OR D,
 \$12,000 IF YOU CHECKED BOX B
 \$-0- IF YOU CHECKED BOX C 12,000.
11. SUBTRACT LINE 10 FROM LINE 9. IF ZERO OR LESS, ENTER -0- 790,123.
12. ENTER THE SMALLER OF LINE 9 OR LINE 10 12,000.
13. ENTER ONE HALF OF LINE 12 6,000.
14. ENTER THE SMALLER OF LINE 2 OR LINE 13 6,000.
15. MULTIPLY LINE 11 BY 85% (.85). IF LINE 11 IS ZERO, ENTER -0- 671,605.
16. ADD LINES 14 AND 15 677,605.
17. MULTIPLY LINE 1 BY 85% (.85) 41,945.
18. TAXABLE BENEFITS. ENTER THE SMALLER OF LINE 16 OR LINE 17 41,945.
 * ALSO ENTER THIS AMOUNT ON FORM 1040, LINE 6B

FORM 1040 TAX STATEMENT 5

DESCRIPTION	AMOUNT
FROM QUALIFIED DIVIDENDS AND CAPITAL GAIN WORKSHEET	190,807.
TOTAL TO FORM 1040, LINE 16	190,807.

FORM 1040 FEDERAL INCOME TAX WITHHELD - FORM(S) W-2 STATEMENT 6

T S DESCRIPTION	AMOUNT
T MCEWAN MARTINEZ AND DUKES	96,940.
TOTAL TO FORM 1040, LINE 25A	96,940.

FORM 1040 CURRENT YEAR ESTIMATES AND AMOUNT APPLIED FROM PREVIOUS YEAR STATEMENT 7

DESCRIPTION	AMOUNT
1ST QTR ESTIMATE PAYMENT - JOINT	35,000.
2ND QTR ESTIMATE PAYMENT - JOINT	35,000.
3RD QTR ESTIMATE PAYMENT - JOINT	35,000.
4TH QTR ESTIMATE PAYMENT - JOINT	35,000.
TOTAL TO FORM 1040, LINE 26	140,000.

FORM 1040 FEDERAL INCOME TAX WITHHELD - OTHER FORMS STATEMENT 8

T S DESCRIPTION	AMOUNT
FORM 8959, LINE 24	801.
TOTAL TO FORM 1040, LINE 25C	801.

SCHEDULE 1 SELF-EMPLOYED HEALTH INSURANCE DEDUCTION WORKSHEET STATEMENT 9

RAFAEL E. MARTINEZ

MCEWAN, MARTINEZ., DUKES & HALL P.A.

1	NONSPECIFIED HEALTH INSURANCE PAYMENTS	19,801.
2	NET PROFIT FROM TRADE OR BUSINESS UNDER WHICH INSURANCE PLAN IS ESTABLISHED	281,801.
3	TOTAL OF ALL NET PROFITS AND EARNED INCOME. S CORPORATIONS SKIP TO LINE 9	
4	DIVIDE LINE 2 BY LINE 3	
5	DEDUCTIBLE PORTION OF SELF-EMPLOYMENT TAX	
6	LINE 4 TIMES LINE 5	
7	LINE 2 MINUS LINE 6	
8	SELF-EMPLOYED SEP, SIMPLE, AND QUALIFIED PLANS ATTRIBUTABLE TO TRADE OR BUSINESS NAMED ABOVE	
9	LINE 7 MINUS LINE 8. S CORPORATIONS ENTER WAGES RECEIVED	281,801.
10	FORM 2555, LINE 45 ATTRIBUTABLE TO THE TRADE OR BUSINESS NAMED ABOVE	
11	LINE 9 MINUS LINE 10	281,801.
12	SELF-EMPLOYED HEALTH INSURANCE DEDUCTION. LESSER OF LINE 1 OR LINE 11	19,801.

SCHEDULE A	CASH CONTRIBUTIONS		STATEMENT 10
DESCRIPTION	AMOUNT 100% LIMIT	AMOUNT 60% LIMIT	AMOUNT 30% LIMIT
FIRST PRESBYTERIAN CHURCH OF ORLANDO		525.	
FSU COLLEGE OF LAW		100.	
GO MINISTRIES		100.	
BASKER OF BLESSINGS		100.	
TRINITY FORUM		100.	
ADVENT EARLY HEARING CENTER		100.	
2022 WALK TO END ALZHEIMERS		100.	
ST JAMES CATHEDRAL		3,700.	
FROM K-1 - MCEWAN, MARTINEZ., DUKES & HALL P.A.		453.	
SUBTOTALS		5,278.	
TOTAL TO SCHEDULE A, LINE 11			5,278.

SCHEDULE A	MEDICAL AND DENTAL EXPENSES	STATEMENT 11
DESCRIPTION	AMOUNT	
SELF-EMPLOYED HEALTH INSURANCE	6,532.	
TOTAL TO SCHEDULE A, LINE 1	6,532.	

SCHEDULE A	STATE AND LOCAL GENERAL SALES TAXES	STATEMENT 12
DESCRIPTION	AMOUNT	
STATE SALES TAX	1,899.	
LOCAL SALES TAX	158.	
TOTAL TO SCHEDULE A, LINE 5A	2,057.	

SCHEDULE A

GENERAL SALES TAX DEDUCTION WORKSHEET

STATEMENT 13

1	ENTER YOUR STATE GENERAL SALES TAXES FROM THE APPLICABLE TABLE. FLORIDA IF, FOR ALL OF 2022, YOU LIVED ONLY IN CONNECTICUT, THE DISTRICT OF COLUMBIA, INDIANA, KENTUCKY, MAINE, MARYLAND, MASSACHUSETTS, MICHIGAN, NEW JERSEY, OR RHODE ISLAND, SKIP LINES 2 THROUGH 5, ENTER -0- ON LINE 6, AND GO TO LINE 7. OTHERWISE, GO TO LINE 2.	1,899.
2	DID YOU LIVE IN ALASKA, ARIZONA, ARKANSAS, COLORADO, GEORGIA, ILLINOIS, LOUISIANA, MISSISSIPPI, MISSOURI, NEW YORK, NORTH CAROLINA, SOUTH CAROLINA, TENNESSEE, UTAH, OR VIRGINIA IN 2022? IF NO, ENTER -0-. IF YES, ENTER YOUR LOCAL GENERAL SALES TAXES FROM THE APPLICABLE TABLE.	0.
3	DID YOUR LOCALITY IMPOSE A LOCAL GENERAL SALES TAX IN 2022? RESIDENTS OF CALIFORNIA AND NEVADA SEE INSTRUCTIONS. IF NO, SKIP LINES 3 THROUGH 5, ENTER -0- ON LINE 6 AND GO TO LINE 7. IF YES, ENTER YOUR LOCAL GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	.5000
4	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, SKIP LINES 4 AND 5 AND GO TO LINE 6. IF YES, ENTER YOUR STATE GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	6.0000
5	DIVIDE LINE 3 BY LINE 4. ENTER THE RESULT AS A DECIMAL (ROUNDED TO AT LEAST THREE PLACES).	.0830
6	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, MULTIPLY LINE 2 BY LINE 3. IF YES, MULTIPLY LINE 1 BY LINE 5.	158.
6A ADD LINE 1 AND LINE 6.		2,057.
6B PART-YEAR DAYS RATE.		1.000000
6C MULTIPLY LINE 6A BY LINE 6B.		2,057.
7	ENTER YOUR GENERAL SALES TAXES PAID ON SPECIFIED ITEMS, IF ANY.	
8	DEDUCTION FOR GENERAL SALES TAXES. ADD LINES 6C AND 7. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 5A AND CHECK BOX.	2,057.



SCHEDULE B TAX-EXEMPT INTEREST FROM 1099-DIV STATEMENT 14

NAME OF PAYER	AMOUNT
RAYMOND JAMES & ASSOCIATES, INC.	3,893.
TOTAL TAX-EXEMPT INTEREST FROM 1099-DIV TO SCHEDULE B, LINE 5	3,893.

SCHEDULE D SHORT-TERM CAPITAL GAINS AND LOSSES STATEMENT 15

DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST OR OTHER BASIS	GAIN OR LOSS
COMPUTERSHARE; DSPP				26.	-26.
TOTAL TO SCH D, LINE 1A				26.	-26.

SCHEDULE D NET LONG-TERM GAIN OR LOSS FROM FORMS 4797, 2439, 6252, 4684, 6781 AND 8824 STATEMENT 16

DESCRIPTION OF PROPERTY	GAIN OR LOSS	28% GAIN
FORM 4797	1,047.	
TOTAL TO SCHEDULE D, PART II, LINE 11	1,047.	

SCHEDULE D CAPITAL GAIN DISTRIBUTIONS STATEMENT 17

NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
CONVERSUS STEPSTONE PRIVATE MARKETS	2,588.	
RAYMOND JAMES & ASSOCIATES, INC.	2,474.	
RAYMOND JAMES & ASSOCIATES, INC.	17,908.	
TOTALS TO SCHEDULE D, LINE 13	22,970.	



SCHEDULE E INCOME OR (LOSS) FROM PARTNERSHIPS AND S CORPS STATEMENT 18

NAME

EMP ID NO.

CODE	X IF FRN	BASIS COMP REQ	ANY NOT AT RISK	PASSIVE LOSS	PASSIVE INCOME	NONPASSIVE LOSS	SEC. 179 DEDUCTION	NONPASSIVE INCOME
MCEWAN-EDWARDS BUILDING, LLC								
20-4590532								74,133.
P								
BASIS CARRYOVER								
20-4590532						5,377.		
P								
MCEWAN, MARTINEZ., DUKES & HALL P.A.								
59-2668632								423,046.
S		X						
CSE OPORTUNITY FUND II LLC								
84-3718427					1,867.			
P								
CSE CREDIT TENANT FUND III, LLC								
86-3000182				1.				
P								
C4 HUDSON INVESTOR LLC								
85-4284697				2,905.				
P								
CSE MIXED USE- MULTIFAMILY FUND IV LLC								
87-1978808				8.				
P								
TOTALS TO SCH. E, LN. 29				2,914.	1,867.	5,377.		497,179.

FORM 6251 PASSIVE ACTIVITIES STATEMENT 19

NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
CSE OPORTUNITY FUND II LLC	FORM 4797	1,047.	1,047.	
CSE OPORTUNITY FUND II LLC	SCH E	1,867.	1,867.	
CSE CREDIT TENANT FUND III, LLC	SCH E	-1.	-1.	
C4 HUDSON INVESTOR LLC	SCH E	-2,905.	-2,905.	
CSE MIXED USE-MULTIFAMILY FUND IV LLC	SCH E	-8.	-8.	
TOTAL TO FORM 6251, LINE 2M				

FORM 6251 LOSS LIMITATIONS STATEMENT 20

NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
MCEWAN-EDWARDS BUILDING, LLC	SCH E	68,644.	68,789.	-145.
TOTAL TO FORM 6251, LINE 2N				-145.

FORM 6251 INTEREST FROM SPECIFIED PRIVATE ACTIVITY BONDS STATEMENT 21

DESCRIPTION	AMOUNT
RAYMOND JAMES & ASSOCIATES, INC.	529.
TOTAL TO FORM 6251, LINE 2G	529.

FORM 8995-A QUALIFIED REIT DIVIDENDS AND PTP INCOME STATEMENT 22

NAME OF ENTITY/ACTIVITY	REIT DIVIDENDS	PTP INCOME
RAYMOND JAMES & ASSOCIATES, INC.	53.	
RAYMOND JAMES & ASSOCIATES, INC.	77.	
TOTAL TO FORM 8995-A, LINE 28	130.	

FORM 8995-A QUALIFIED BUSINESS INCOME STATEMENT 23
SCHEDULE C

ACTIVITY NAME	INCOME	LOSS REDUCTION	ADJUSTED QBI
CSE OPORTUNITY FUND II LLC	1,867.	1,867.	0.
MG-CA HUDSON JV LLC	-32,171.		
C4 HUDSON INVESTOR LLC	-63.		
CSE CREDIT TENANT FUND III, LLC	-24.		
CSE MIXED USE- MULTIFAMILY FUND IV LLC	-9.		

FORM 8960 TRADE OR BUSINESS INCOME STATEMENT 24

MCEWAN-EDWARDS BUILDING, LLC	-68,756.
MCEWAN, MARTINEZ., DUKES & HALL P.A.	-423,046.
AMOUNT TO FORM 8960, LINE 4B	-491,802.

FORM 8582 OTHER PASSIVE ACTIVITIES - PART V STATEMENT 25

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
CSE OPORTUNITY FUND II LLC	2,914.	0.		2,914.	
CSE CREDIT TENANT FUND III, LLC	0.	-6.			-6.
C4 HUDSON INVESTOR LLC	0.	-32,234.			-32,234.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	0.	-91.			-91.
TOTALS	2,914.	-32,331.		2,914.	-32,331.

FORM 8582 ALLOCATION OF UNALLOWED LOSSES - PART VII STATEMENT 26

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	.000185580	5.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	.996999783	29,329.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	.002814637	83.
TOTALS		32,331.	1.000000000	29,417.

FORM 8582 ALLOWED LOSSES - PART VIII STATEMENT 27

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	5.	1.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	29,329.	2,905.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	83.	8.
TOTALS		32,331.	29,417.	2,914.

FORM 8582 SUMMARY OF PASSIVE ACTIVITIES STATEMENT 28

R R E A NAME	FORM OR SCHEDULE	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
CSE OPORTUNITY FUND II LLC	FORM 4797	1,047.	1,047.		
CSE OPORTUNITY FUND II LLC	SCH E	1,867.	1,867.		
CSE CREDIT TENANTS FUND III, LLC	SCH E	-6.	-6.	5.	1.
C4 HUDSON INVESTOR LLC	SCH E	-32,234.	-32,234.	29,329.	2,905.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	-91.	-91.	83.	8.
		-29,417.	-29,417.	29,417.	2,914.

RAFAEL E. & REBECCA E. MARTINEZ



TOTALS

PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME

TOTAL TO FORM 8582, LINE 11

2,914.

FORM 8582

ALTERNATIVE MINIMUM TAX
OTHER PASSIVE ACTIVITIES - PART V

STATEMENT 29

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
CSE OPORTUNITY FUND II LLC	2,914.	0.		2,914.	
CSE CREDIT TENANT FUND III, LLC	0.	-6.			-6.
C4 HUDSON INVESTOR LLC	0.	-32,234.			-32,234.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	0.	-91.			-91.
TOTALS	2,914.	-32,331.		2,914.	-32,331.

FORM 8582

ALTERNATIVE MINIMUM TAX
ALLOCATION OF UNALLOWED LOSSES - PART VII

STATEMENT 30

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	.000185580	5.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	.996999783	29,329.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	.002814637	83.
TOTALS		32,331.	1.000000000	29,417.

FORM 8582

ALTERNATIVE MINIMUM TAX
ALLOWED LOSSES - PART VIII

STATEMENT 31

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
CSE CREDIT TENANT FUND III, LLC	SCH E	6.	5.	1.
C4 HUDSON INVESTOR LLC	SCH E	32,234.	29,329.	2,905.
CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	91.	83.	8.
TOTALS		32,331.	29,417.	2,914.

FORM 8582AMT SUMMARY OF PASSIVE ACTIVITIES - AMT STATEMENT 32

R R E A	NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
-	CSE OPORTUNITY FUND II LLC	FORM 4797	1,047.		1,047.		
	CSE OPORTUNITY FUND II LLC	SCH E	1,867.		1,867.		
	CSE CREDIT TENANTS FUND III, LLC	SCH E	-6.		-6.	5.	1.
	C4 HUDSON INVESTOR LLC	SCH E	-32,234.		-32,234.	29,329.	2,905.
	CSE MIXED USE- MULTIFAMILY FUND IV LLC	SCH E	-91.		-91.	83.	8.
	TOTALS		-29,417.		-29,417.	29,417.	2,914.
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME							
TOTAL TO FORM 8582AMT, LINE 11							2,914.

SCHEDULE K-1 NONDEDUCTIBLE EXPENSES, BOX 16, CODE C

DESCRIPTION	AMOUNT	SHAREHOLDER FILING INSTRUCTIONS
NONDEDUCTIBLE ENTERTAINMENT EXPENSE	5,443.	
NONDEDUCTIBLE CLUB DUES	3,781.	
NONDEDUCTIBLE FIRM PARKING	26,179.	
TOTAL	35,403.	

SCHEDULE K-1 DISTRIBUTIONS
BOX 16, CODE D

DESCRIPTION	DATE	AMOUNT	FILING INSTRUCTIONS
CASH DISTRIBUTION	12/31/22	345,926.	
TOTAL		345,926.	

SCHEDULE K-1 DISPOSITIONS OF PROPERTY
WITH SECTION 179 DEDUCTIONS, BOX 17, CODE K

DESCRIPTION OF PROPERTY							
DATE ACQUIRED	DATE SOLD	YEAR OF PASSTHRU	SALES PRICE	COST OR BASIS PLUS EXP.	DEPR. ALLOWED	SEC. 179 EXPENSE	AMT DEPR.
WORK STATIONS							
12/03/12	12/31/22	2012	0.	920.	0.	920.	
2ND HALF OF WORKSTATIONS							
01/25/13	12/31/22	2013	0.	1,029.	0.	1,029.	
DELL OPTIPLEX 7020 DESKTOP							
10/30/15	12/31/22	2015	0.	775.	0.	775.	
TOTAL			0.	2,724.	0.	2,724.	

SCHEDULE K-1

OTHER INFORMATION, BOX 17, CODE AD

DESCRIPTION	AMOUNT	SHAREHOLDER FILING INSTRUCTIONS
MEDICAL INSURANCE PREMIUMS FOR MORE THAN 2% SHAREHOLDERS	19,801.	SEE SHAREHOLDERS INSTRUCTIONS

SCHEDULE K-1

SECTION 199A ADDITIONAL INFORMATION

THE SECTION 199A AMOUNTS TO BE USED IN THE CALCULATION OF THE QUALIFIED BUSINESS INCOME DEDUCTION ON YOUR 1040/1041 RETURN ARE REPORTED ON LINE 17, UNDER CODE V. PLEASE CONSULT YOUR TAX ADVISOR REGARDING THE CALCULATION OF QUALIFIED BUSINESS INCOME DEDUCTION, INCLUDING THE POSSIBLE AGGREGATIONS AND LIMITATIONS THAT MAY APPLY AND THE FILING OF THE 1.199A-4(C)(2)(I) ANNUAL DISCLOSURE STATEMENT.

SCHEDULE K-1

SECTION 199A ITEMS, BOX 17
CODE V

DESCRIPTION

AMOUNT

TRADE OR BUSINESS
X - SSTB

ORDINARY INCOME(LOSS)
W-2 WAGES
UNADJUSTED BASIS

423,046.
1,920,466.
127,022.

SCHEDULE K-1 GROSS RECEIPTS FOR SECTION 448(C), BOX 17, CODE AC

DESCRIPTION

AMOUNT

GROSS RECEIPTS - CURRENT YEAR

3,137,033.

SCHEDULE K-1

SCHEDULE K-3 NOTIFICATION

THE SCHEDULE K-3 HAS NOT BEEN PREPARED FOR YOU. YOU WILL NOT RECEIVE A COPY OF THE SCHEDULE UNLESS YOU REQUEST ONE.

Schedule K-1
(Form 1065)Department of the Treasury
Internal Revenue Service

2022

For calendar year 2022, or tax year

☐ Final K-1☐ Amended K-1

OMB No. 1545-0123

beginning

ending

Partner's Share of Income, Deductions,
Credits, etc.

See separate instructions.

Part I Information About the Partnership

A Partnership's employer identification number

20-4590532

B Partnership's name, address, city, state, and ZIP code

MCEWAN-EDWARDS BUILDING, LLC
108 EAST CENTRAL BLVD.
ORLANDO, FL 32801

C IRS center where partnership filed return:

E-FILE

D ☐ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's SSN or TIN (Do not use TIN of a disregarded entity. See instructions.)

F Name, address, city, state, and ZIP code for partner entered in E. See instructions.

RAFAEL E. & REBECCA MARTINEZ
AS TENANTS BY THE ENTIRETIES
1115 WOODLAND STREET
ORLANDO, FL 32806G ☒ General partner or LLC
member-manager☐ Limited partner or other LLC
memberH1 ☒ Domestic partner☐ Foreign partnerH2 ☐ If the partner is a disregarded entity (DE), enter the partner's:

TIN

Name

I1 What type of entity is this partner? INDIVIDUALI2 If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here ☐

J Partner's share of profit, loss, and capital:

	Beginning	Ending
Profit	50.0000000%	50.0000000%
Loss	50.0000000%	50.0000000%
Capital	50.0000000%	50.0000000%

Check if decrease is due to sale or exchange of partnership interest ☐

K Partner's share of liabilities:

	Beginning	Ending
Nonrecourse	\$	\$
Qualified nonrecourse financing	\$	\$
Recourse	\$ 481.	\$ 481.

Check this box if item K includes liability amounts from lower-tier partnerships ☐

L Partner's Capital Account Analysis

Beginning capital account	\$ 236,578.
Capital contributed during the year	\$
Current year net income (loss)	\$ 74,166.
Other increase (decrease) (attach explanation)	\$
Withdrawals and distributions	\$(82,578.)
Ending capital account	\$ 228,166.

M Did the partner contribute property with a built-in gain (loss)?

☐ Yes ☒ No If "Yes," attach statement. See instructions.

N Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)

Beginning	\$
Ending	\$

Part III Partner's Share of Current Year Income,
Deductions, Credits, and Other Items

1 Ordinary business income (loss)	0.	14 Self-employment earnings (loss)	0.
2 Net rental real estate income (loss)	78,345.	15 Credits	
3 Other net rental income (loss)		16 Schedule K-3 is attached if checked ☐	
4a Guaranteed payments for services		17 Alternative min tax (AMT) items	-145.
4b Guaranteed payments for capital		A	
4c Total guaranteed payments		18 Tax-exempt income and nondeductible expenses	
5 Interest income	33.	19 Distributions	82,578.
6a Ordinary dividends		A	
6b Qualified dividends		20 Other information	33.
6c Dividend equivalents		A	
7 Royalties		Z	* STMT
8 Net short-term capital gain (loss)			
9a Net long-term capital gain (loss)			
9b Collectibles (28%) gain (loss)			
9c Unrecaptured section 1250 gain			
10 Net section 1231 gain (loss)			
11 Other income (loss)			
12 Section 179 deduction		21 Foreign taxes paid or accrued	
13 Other deductions	W* 4,212.		
22 ☐ More than one activity for at-risk purposes*			
23 ☐ More than one activity for passive activity purposes*			

*See attached statement for additional information.

For IRS Use Only

SCHEDULE K-1

OTHER DEDUCTIONS, BOX 13, CODE W

DESCRIPTION	PARTNER FILING INSTRUCTIONS	AMOUNT
SECTION 754 DEPRECIATION - RENTAL REAL ESTATE	SEE IRS SCH. K-1 INSTRUCTIONS	4,212.
TOTAL TO SCHEDULE K-1, BOX 13, CODE W		4,212.

SCHEDULE K-1

SECTION 199A INFORMATION, BOX 20, CODE Z

DESCRIPTION	AMOUNT
RENT - COMMERCIAL BUILDING	
X - SSTB	
RENTAL INCOME (LOSS)	78,345.
OTHER DEDUCTIONS *	4,212.
SECTION 754 DEPRECIATION DEDUCTION	4,212.
UNADJUSTED BASIS OF ASSETS	337,070.

SCHEDULE K-1 SECTION 199A ADDITIONAL INFORMATION

THE SECTION 199A AMOUNTS TO BE USED IN THE CALCULATION OF QUALIFIED BUSINESS INCOME DEDUCTION ON YOUR 1040/1041 RETURN ARE REPORTED ON LINE 20, UNDER CODE Z. PLEASE CONSULT YOUR TAX ADVISOR REGARDING THE CALCULATION OF THE QUALIFIED BUSINESS INCOME DEDUCTION, INCLUDING THE POSSIBLE AGGREGATIONS AND LIMITATIONS THAT MAY APPLY AND THE FILING OF THE 1.199A-4(C)(2)(I) ANNUAL DISCLOSURE STATEMENT.

SCHEDULE K-1 CURRENT YEAR NET INCOME (LOSS) AND
OTHER INCREASES(DECREASES)

DESCRIPTION	AMOUNT	TOTALS
RENTAL REAL ESTATE INCOME (LOSS)	78,345.	
INTEREST INCOME	33.	
SCHEDULE K-1 INCOME SUBTOTAL		78,378.
OTHER DEDUCTIONS	-4,212.	
SCHEDULE K-1 DEDUCTIONS SUBTOTAL		-4,212.
NET INCOME (LOSS) PER SCHEDULE K-1		74,166.

SCHEDULE K-1 SCHEDULE K-3 NOTIFICATION

THE SCHEDULE K-3 HAS NOT BEEN PREPARED FOR YOU. YOU WILL NOT RECEIVE A COPY OF THE SCHEDULE UNLESS YOU REQUEST ONE.

Schedule of Activities

For calendar year 2022, or tax year beginning

, 2022, and ending

Name: MCEWAN-EDWARDS BUILDING, LLC

20-4590532

For: RAFAEL E. & REBECCA MARTINEZ AS TENAN

Description of Activity	Activity Number	100% Disposed	PTP	P/T 199A	Type Code	Description
	1				7	COMMERCIAL BUILDING
Ordinary business income (loss)						Activity - 1
Net rental real estate income (loss)						78,345.
Other net rental income (loss)						
Interest income						
Dividends - Ordinary dividends						
- Qualified dividends						
- Dividend equivalents (1065 only)						
Royalties						
Net short-term capital gain (loss)						
Net long-term capital gain (loss)						
- Collectibles (28%) gain (loss)						
- Unrecaptured Section 1250 gain						
Net section 1231 gain (loss)						
Other portfolio income						
Section 1256 contracts and straddles						
Other income						
Section 179 deduction						
Charitable contributions						
Portfolio deductions						
Investment interest expense						
Section 59(e)(2) expenditures						
Excess business interest expense						4,212.
Other deductions						
Net earnings from self-employment						
Gross farming or fishing income						
Gross nonfarm income						
LIH credit - Section 42(j)(5) partnerships						
- Other						
Qualified rehabilitation expenditures related to rental real estate						
Other rental credits						
Credits related to other rental activities						
Recapture of LIH credit - Section 42(j)(5) partnerships						
- Other						
Other credits						-145.
Post-1986 depreciation adjustment						
Adjusted gain or loss						
Portion of adjusted gain/loss allocable to short-term gain/loss						
Portion of adjusted gain/loss allocable to long-term gain/loss						
Portion of adjusted gain/loss allocable to section 1231 gain/loss						
Depletion (other than oil and gas)						
Oil, gas and geothermal properties - gross income						
Oil, gas and geothermal properties - deductions						
Other AMT items						
Investment income						
Investment expenses						
Section 199A - W-2 wages						337,070.
- Unadjusted basis of assets						
- REIT dividends						
- Cooperative qualified business income						
- Cooperative W-2 wages						

Client Review Contents as of Dec 31, 2022

ZIZMER - JONES
PRIVATE WEALTH MANAGEMENT GROUP OF
RAYMOND JAMES®

The Martinez Family

Zizmer Jones Group

Report Listing

Report Name	Page
Net Worth Statement	3
Additional Information	4

Account Listing

Raymond James	Account Number	Account Type	Market Value (\$)
Martinez - Joint Illiquid Alts	xxxx	Joint	185,073.20
Becky - Roth IRA	xxxx	IRA - RJ Custodian	81,312.11
Martinez - Joint	xxxx	Joint	1,231,604.70
Rebecca - Assets from Trust	xxxx	Individual	337,287.02
Becky - Bene IRA	xxxx	IRA - RJ Custodian	996,388.89
Ralph - Roth IRA	xxxx	IRA - RJ Custodian	58,388.84
Total Raymond James Market Value			\$2,890,054.76

External Accounts	Financial Institution	Last Update	Account Type	Market Value (\$)
McEwan, Martinez, Dukes & Hall P.A. Retirement Plan	John Hancock Retirement Plan Services - Participant	1/3/23	401(k)	2,219,792.85
Home Checking [REDACTED]	JP Morgan Online	1/2/23	Checking Account	132,457.29
Home sm		7/22/21	Home	1,000,000.00
DT Office Building sm		12/9/22	Home	900,000.00
CSE II Opportunity Fund sm		2/17/22	Investment	60,000.00
Maggie Checking [REDACTED]	JP Morgan Online	1/2/23	Checking Account	5,858.94
Maggie Savings [REDACTED]	JP Morgan Online	1/2/23	Savings Account	30,295.66
Office Stock sm		7/22/21	Individual	400,000.00
Conversus sm		2/17/22	Individual	150,000.00

Client Review Contents as of Dec 31, 2022

ZIZMER - JONES
PRIVATE WEALTH MANAGEMENT GROUP OF
RAYMOND JAMES®

The Martinez Family

Zizmer Jones Group

Account Listing (continued)

External Accounts	Financial Institution	Last Update	Account Type	Market Value (\$)
Becky Ralph Savings	JP Morgan Online	1/2/23	Savings Account	58,247.75
Total External Accounts Market Value				\$4,956,652.49
Total Portfolio				\$7,846,707.25
^m This account was manually entered				

Net Worth Statement as of Dec 31, 2022

The Martinez Family

Zizmer Jones Group

Net Worth Statement Summary†

Assets		Amount (\$)
■ Raymond James		2,890,054.76
External Assets		4,956,652.49
Total Assets		\$7,846,707.25
Liabilities		Amount (\$)
■ Raymond James		0.00
External Liabilities		0.00
Total Liabilities		\$0.00
Net Worth		Amount (\$)
Raymond James		2,890,054.76
External Accounts		4,956,652.49
Total Net Worth		\$7,846,707.25



† Market values and percentages include assets held in external accounts. Please refer to the Additional Information section of this report for more information.