

General Information

Name: Daliah H Weiss

CONFIDENTIAL**PID 17874****AGENCY INFORMATION**

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

CANDIDATE FOR

Position	Agency Name	Position sought or held
Circuit Judge	15th Judicial Circuit	Circuit Judge, Group 29

Net WorthMy Net Worth as of December 31, 2023 was \$ 7,207,588.41.**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 \$ 47,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/11/2024

Description of Asset	Value of Asset
2021 Starcraft MDX 211 boat	\$ 33,000.00
Wells Fargo checking account	\$ 18,216.22
{REDACTED}	\$ 534,185.00
Bank of America bank account	\$ 172,553.16
Chase bank account	\$ 2,736.00
Fidelity Education Acct, Child 1, NH College Port -Fidelity Fund	\$ 24,183.86
Voya Financial: Voya Fixed Account	\$ 1,959.05
Voya con't : Voya Intermediate Bond Fund	\$ 1,885.45
Voya con't: American Funds Growth Fnd	\$ 4,357.18
Voya con't: American Funds Am Balanced	\$ 2,084.29
Voya con't: Fidelity 500 Index Fund	\$ 2,165.76
Voya con't: JP Morgan Mid Cap Growth Fund	\$ 4,055.31
Voya con't: Loomis Sayles Sm Cp Growth Fund	\$ 1,928.68
Voya con't: American Funds New Perspective	\$ 2,079.07
Learning Quest 529 Schwab: Baird Core Plus Bond Fund	\$ 4,497.00
Schwab con't: Vanguard Total International Stock Index Fund	\$ 4,497.00
Schwab con't: Ultra Short Bond Acct	\$ 7,495.00
Schwab con't: American Century Short Duration Inflation Protection Bond Fund	\$ 1,999.00
Schwab con't: cash	\$ 9,993.00
Morgan Stanley: joint tenants with Child 1: stock: Walt Disney	\$ 9,209.58
MS con't: Vanguard closed end fund	\$ 5,112.00
MS con't: Federated Hermes Govt Mutual Fund	\$ 15,932.73
Morgan Stanley with Child 2: mutual fund Federated Hermes Govt Obl Prm	\$ 16,445.68
Morgan Stanley: Daliah H Weiss Trustee, The Maximo Handel Rev Trust- 50 percent of cash account	\$ 261,946.60

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Description of Asset	Value of Asset
Morgan Stanley: Daliah H Weiss, Irrevocable Trust fbo Child 1, Mutual Fund Federated Hermes Govt Obl Prm s Trustee	\$ 21,036.36
MS : Irrev. Trust FBO Child 1 con't: Mutual Fund Fidelity Freedom 2020	\$ 40,440.18
Morgan Stanley: Daliah H Weiss Trustee Irrev Trust FBO Child 2, Mutual Fund Fidelity Freedom 2020	\$ 40,536.50
Wells Fargo checking account	\$ 10,544.64
Morgan Stanley Handel Heritage Trust (Cash)	\$ 11,416.14
Morgan Stanley Handel Heritage Trust (Berkshire Hathaway)	\$ 89,165.00
Morgan Stanley Handel Heritage Trust (Duke Energy)	\$ 12,712.24
Morgan Stanley Handel Heritage Trust (Eli Lilly)	\$ 83,357.56
Morgan Stanley Handel Heritage Trust (GS Market Linked Note SPX)	\$ 28,575.00
Morgan Stanley Handel Heritage Trust (Johnson & Johnson)	\$ 15,830.74
Morgan Stanley Handel Heritage Trust (Microsoft Corp)	\$ 131,614.00
Morgan Stanley Handel Heritage Trust (Nextera)	\$ 60,740.00
Morgan Stanley Handel Heritage Trust (PepsiCo)	\$ 8,492.00
Morgan Stanley Handel Heritage Trust (RTX Corp)	\$ 9,844.38
Morgan Stanley Handel Heritage Trust (Verizon)	\$ 5,655.00
Morgan Stanley Handel Heritage Trust (Waste Management Inc)	\$ 35,820.00
Morgan Stanley Handel Heritage Trust (Allstate)	\$ 10,620.00
Morgan Stanley Handel Heritage Trust (Morgan Stanley)	\$ 18,970.00
Morgan Stanley Handel Heritage Trust (Wells Fargo)	\$ 17,700.00
Morgan Stanley Handel Heritage Trust (Pimco)	\$ 13,462.50
Morgan Stanley Handel Heritage Trust Bonds (Florida HSG Fin Corp)	\$ 9,964.30
Morgan Stanley Handel Heritage Trust Bonds (Illinois HSG DEV AUTH RES))	\$ 19,924.00
Morgan Stanley Handel Heritage Trust Bonds (Hillsborough County Aviation Auth Tampa Intl Airport))	\$ 25,750.03

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Description of Asset	Value of Asset
Morgan Stanley Handel Heritage Trust Bonds (Florida HSG Fin Corp)	\$ 14,913.30
Morgan Stanley Handel Heritage Trust Bonds (Florida St Bd ED Lottery REV))	\$ 15,001.80
Morgan Stanley Handel Heritage Trust Bonds (NY ST MTG AGY HOME OWNER)	\$ 24,818.25
Morgan Stanley Handel Heritage Trust Bonds (MASSACHUSETT HSG FIN AGCY-8))	\$ 4,952.65
Morgan Stanley Handel Heritage Trust Bonds (JEA ST JOHN RIVER PARK SYSTEM))	\$ 10,001.20
Morgan Stanley Handel Heritage Trust Bonds (MASSACHUSETT HSG FIN AGCY-182)	\$ 14,841.30
Morgan Stanley Handel Heritage Trust Bonds (North Dakota ST HSG FIN AGY)	\$ 4,983.80
Morgan Stanley Handel Heritage Trust Bonds (Oregon ST)	\$ 5,028.90
Morgan Stanley Handel Heritage Trust Bonds (NEW YORK STATE THRUWAY AUTH))	\$ 15,001.70
Morgan Stanley Handel Heritage Trust Bonds (West Feliciana Parish LA))	\$ 11,208.50
Morgan Stanley Handel Heritage Trust Bonds (Gloucester Cnty NJ)	\$ 15,064.80
Morgan Stanley Handel Heritage Trust Bonds (Florida ST Turnpike Rev Ref B))	\$ 15,005.10
Morgan Stanley Handel Heritage Trust Bonds (Lower TWP NJ)	\$ 4,670.60
Morgan Stanley Handel Heritage Trust Bonds (Anaheim Califon UN HIGH DIST))	\$ 10,042.40
Morgan Stanley Handel Heritage Trust Bonds (Florida St Mun Pwr Agy Rev))	\$ 9,998.20
Morgan Stanley Handel Heritage Trust Bonds (Maine St Hsg Auth Mtg Pur))	\$ 4,985.85
Morgan Stanley Handel Heritage Trust Bonds (Pennsylvania Turnpike Commission Sub Rev A))	\$ 14,906.25
Morgan Stanley Handel Heritage Trust Bonds (Decatur Illinois GENL OBLIG)	\$ 10,024.60
Morgan Stanley Handel Heritage Trust Bonds (Sussex County NJ)	\$ 18,695.60

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Description of Asset	Value of Asset
Morgan Stanley Handel Heritage Trust Bonds (Florida HSG Fin Corp Mtge Rev 1)	\$ 4,866.20
Morgan Stanley Handel Heritage Trust Bonds (Las Cruces N Mexico Sch Dist No OO OID)	\$ 9,403.90
Morgan Stanley Handel Heritage Trust Bonds (Alaska Mun Bk Auth Mastr Resktn Genl Oblig Ser-A))	\$ 20,483.00
Morgan Stanley Handel Heritage Trust Bonds (Lakeland Fla Energy))	\$ 9,939.20
Morgan Stanley Handel Heritage Trust Bonds (Florida Higher Edl Facs)	\$ 9,965.10
Morgan Stanley Handel Heritage Trust Bonds (Clark County Nevada))	\$ 20,060.60
Morgan Stanley Handel Heritage Trust Bonds (Florida State Mun Pwr Agy))	\$ 24,914.50
Morgan Stanley Handel Heritage Trust Bonds (St. Petersburg FLA PUB SVC TAX))	\$ 14,982.15
Morgan Stanley Handel Heritage Trust Bonds (St. Michigan Housing DEV Auth Rev-A))	\$ 5,001.45
Morgan Stanley Handel Heritage Trust Bonds (NY GENL OBLIG SER-i-1))	\$ 10,002.80
Morgan Stanley Handel Heritage Trust Bonds (Green Bay Wis))	\$ 4,585.70
Morgan Stanley Handel Heritage Trust Bonds (Miami Dade Co FLA EDL FLCs AUTH REV UM))	\$ 10,005.50
Morgan Stanley Handel Heritage Trust Bonds (Connecticut ST)	\$ 15,241.20
Morgan Stanley Handel Heritage Trust Bonds (Trustees of Indiana University Consolidated))	\$ 14,935.65
Morgan Stanley Handel Heritage Trust Bonds (Florida HSG FIN CORP GREEN))	\$ 25,536.50
Morgan Stanley Handel Heritage Trust Bonds (Florida St. Tpk Auth Tpk Re Oid))	\$ 10,002.80
Morgan Stanley Handel Heritage Trust Bonds (Hernando Cnty Fla Sch Brd CTFS PARTN))	\$ 14,888.25
Morgan Stanley Handel Heritage Trust Bonds (Jacksonville Fla Trans Re OID))	\$ 10,013.10
Morgan Stanley Handel Heritage Trust Bonds (Virginia Beach VA STORM WTR UTIL REV))	\$ 15,006.30

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Description of Asset	Value of Asset
Morgan Stanley Handel Heritage Trust Bonds (California ST GENL OBLIG VAR PURP REF))	\$ 10,004.10
Morgan Stanley Handel Heritage Trust Bonds (Miami-Dade Cnty FLA SCH BRD CTFS PART OID))	\$ 10,000.70
Morgan Stanley Handel Heritage Trust Bonds (WACO TX FOR ISSUES DID PRIOR TO 3/16/ OID))	\$ 4,877.20
Morgan Stanley Handel Heritage Trust Bonds (Miami-Dade Cnty FLA SCH DIST))	\$ 10,007.80
Morgan Stanley Handel Heritage Trust Bonds (Florida St BRD ED PUB ED CAP OUTLAY GENL OBLIG SER-F))	\$ 9,943.30
Morgan Stanley Handel Heritage Trust Bonds (INDIANA ST HSG & CMNTY DEV AUTH SINGLE F))	\$ 26,090.50
Morgan Stanley Handel Heritage Trust Bonds (RICHMOND V OID)	\$ 14,957.40
Morgan Stanley Handel Heritage Trust Bonds (KAREGNONDI WTR AUTH MI SUPPLY PIPELINE REV-A)	\$ 10,007.90
Morgan Stanley Handel Heritage Trust Bonds (INDIANA ST HSG & CMNTY DEV AUTH SINGLE-)	\$ 26,386.00
Morgan Stanley Handel Heritage Trust Bonds (Lauderhill FL OID)	\$ 15,072.75
Morgan Stanley Handel Heritage Trust Bonds (Florida St BRD ED PUB ED CAP OUTLAY SER-G)	\$ 14,810.55
Morgan Stanley Handel Heritage Trust Bonds (Miami-Dade Cnty FLA TRAN SYS SALES SURTAX REV REF)	\$ 20,460.00
Morgan Stanley Handel Heritage Trust Bonds (Miami-Dade County Expressway Auth Toll Sys Ref rev-A)	\$ 10,062.10
Morgan Stanley Handel Heritage Trust Bonds (Oregon St Hsg & Cmnty Svcs Dept Mtg Rev)	\$ 8,877.20
Morgan Stanley Handel Heritage Trust Bonds (Margate City NJ)	\$ 9,282.10
Morgan Stanley Handel Heritage Trust Bonds (Pennsylvania S Genl Oblig)	\$ 10,102.20
Morgan Stanley Handel Heritage Trust Bonds (LEA FLA WTR & SWR SYS REV)	\$ 25,843.25
Morgan Stanley Handel Heritage Trust Bonds (Pennsylvania St Tpk Commn Tpk RE OID)	\$ 10,264.70
Morgan Stanley Handel Heritage Trust Bonds (North Texas tollway Auth Sys Sec Tier Rev Ref-A)	\$ 15,225.60

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Morgan Stanley Handel Heritage Trust Bonds (County Wtr-Swr Dist Collier Cnty Fla Wtr Rev)	\$ 10,009.60
Morgan Stanley Handel Heritage Trust Bonds (Washoe Cnty Nec Sch Dist Impt Ser-A)	\$ 15,876.60
Morgan Stanley Handel Heritage Trust Bonds (Moreno Valley Calif Pub Fin Auth Lease Rev Ref)	\$ 10,047.80
Morgan Stanley Handel Heritage Trust Bonds (Maine St Housing Auth Mort Purchase Rev-A)	\$ 14,681.10
Morgan Stanley Handel Heritage Trust Bonds (Austin TX)	\$ 15,741.75
Morgan Stanley Handel Heritage Trust Bonds (JEA FLA WTR & SWR SYS REV)	\$ 4,999.85
Morgan Stanley Handel Heritage Trust Bonds (Manatee Cnty Fla Impt Transn Proj Rev Ref)	\$ 16,933.05
Morgan Stanley Handel Heritage Trust Bonds (Oregon ST)	\$ 5,174.45
Morgan Stanley Handel Heritage Trust Bonds (Bay Cnty Fla Sch Brd Ctfs Partn Rev-A)	\$ 10,317.40
Morgan Stanley Handel Heritage Trust Bonds (Central Fla Expwy Auth Sr Lienrev)	\$ 10,808.70
Morgan Stanley Handel Heritage Trust Bonds (North Dakota St Hsg Fin Agy)	\$ 10,140.30
Morgan Stanley Handel Heritage Trust Bonds (Maine St Hsg Auth Mtg Pur)	\$ 25,288.25
Morgan Stanley Handel Heritage Trust Bonds (Miami-Dade Cnty Fla Sch Dist)	\$ 15,484.20
Morgan Stanley Handel Heritage Trust Bonds (Michigan St Hsg Dev Auth Rental Hsg Rev)	\$ 12,997.95
Morgan Stanley Handel Heritage Trust Bonds (Fort Bragg Calif Uni Sch Dist)	\$ 10,194.00
Morgan Stanley Handel Heritage Trust Bonds (Triborough Bridge Tunnel Auth Genl Rev-B)	\$ 15,407.10
Morgan Stanley Handel Heritage Trust Bonds (New York NY)	\$ 10,812.80
Morgan Stanley Handel Heritage Trust Bonds (Illinois Fin Auth Rev Green)	\$ 16,391.70
Morgan Stanley Handel Heritage Trust Bonds (New Jersey St Edl Facs Auth Rev)	\$ 10,318.40

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Description of Asset	Value of Asset
Morgan Stanley Handel Heritage Trust Bonds (Kissimmee Fla Cap Impt Rev)	\$ 15,581.40
Morgan Stanley Handel Heritage Trust Bonds (Hillsborough Cnty Fla Cap Impt Non-Ad Valorem Rev)	\$ 8,771.90
Morgan Stanley Handel Heritage Trust Bonds (New York St Drom Auth Sales Tax Rev St Supported Debt)	\$ 10,633.10
Morgan Stanley Handel Heritage Trust Bonds (Broward Cnty Fla Wtr & Swr Util Rev-A)	\$ 20,446.00
Morgan Stanley Handel Heritage Trust Bonds (Lehigh Cnty Pa Auth Wtr & Swr Rev-A)	\$ 25,001.50
Morgan Stanley Handel Heritage Trust Bonds (South Broward Hosp Dist Fla Rev)	\$ 24,497.00
Morgan Stanley Handel Heritage Trust Bonds (Palm Beach Cnty Fla Health Facs Auth Ho OID)	\$ 8,212.80
Morgan Stanley Handel Heritage Trust Bonds (Orange Cty Health Fac Auth Rev-B)	\$ 10,225.80
Morgan Stanley Handel Heritage Trust Bonds (University Mich Univ Revs)	\$ 15,120.00
Morgan Stanley Handel Heritage Trust Bonds (San Diego Cty Pub Facs Fin Auth Sub Wtr Rev)	\$ 15,564.75
Morgan Stanley Handel Heritage Trust Bonds (Sacramento Calif Mun Util Elec Rev)	\$ 10,205.10
Morgan Stanley Handel Heritage Trust Bonds (Colorado Health Facs Auth Rev)	\$ 7,973.60
Morgan Stanley Handel Heritage Trust Bonds (New York St Dorm Auth St Pers Income Tax)	\$ 24,932.50
Morgan Stanley Handel Heritage Trust Bonds (Santa Clara Cnty Calif Fing Auth Lease Rev)	\$ 8,315.50
Morgan Stanley Handel Heritage Trust Bonds (Florida Hsg Fin Corp Green)	\$ 51,858.00
Morgan Stanley Handel Heritage Trust Bonds (San Antonio Tex Elec & Gas rev ID 12-01-18)	\$ 10,657.10
Morgan Stanley Handel Heritage Trust Bonds (Buffalo N Y Swr Auth Swr Sys Environment Green)	\$ 38,235.50
Morgan Stanley Handel Heritage Trust Bonds (Florida Keys Aqueduct Auth Wtr Rev-A)	\$ 15,214.65
Morgan Stanley Handel Heritage Trust Bonds (Orange Cnty Fla Healt Facs Auth Rev)	\$ 14,717.25

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Description of Asset	Value of Asset
Morgan Stanley Handel Heritage Trust Bonds (NY Metropolitan Trans Auth Trans Rev-C-2)	\$ 10,297.90
Morgan Stanley Handel Heritage Trust Bonds (Ford Motor Credit Co Llc)	\$ 24,598.25
Morgan Stanley Handel Heritage Trust Certificate of deposit: (MS Survivors Optin Limit Market Linked CD SX5E) ()	\$ 18,626.25
Morgan Stanley Handel Heritage Trust Certificate of deposit:(MS Private Bk Purchase NY CD)	\$ 50,051.00
Morgan Stanley Handel Heritage Trust Mutual Fund (Invesco Prem US Govt MNY INST)	\$ 347,727.03
Morgan Stanley IRA - cash	\$ 8,014.46
Morgan Stanley IRA - stocks: Bank of America Corp	\$ 16,835.00
Morgan Stanley IRA - stocks: Cisco Sys Inc	\$ 15,156.00
Morgan Stanley IRA - stocks: Clorox Co	\$ 7,129.50
Morgan Stanley IRA - stocks: Eli Lilly & Co	\$ 116,584.00
Morgan Stanley IRA - stocks:GS Market Linked Note SX5E	\$ 60,900.00
Morgan Stanley IRA - stocks: Kimberly Clark Corp	\$ 12,151.00
Morgan Stanley IRA - stocks: GS Market Linked Note SX5E	\$ 12,105.00
Morgan Stanley IRA - stocks: Nextera Energy Inc	\$ 36,444.00
Morgan Stanley IRA - stocks: Pepsico Inc NC	\$ 16,984.00
Morgan Stanley IRA - stocks: Pfizer Inc	\$ 5,758.00
Morgan Stanley IRA - stocks: Procter and Gamble	\$ 29,308.00
Morgan Stanley IRA - stocks: Public Storage	\$ 25,620.00
Morgan Stanley IRA - stocks: Waste Mgmt Inc	\$ 17,910.00
Morgan Stanley IRA - stocks: Amer Eq Inv Hldg Co 5.95%-A	\$ 10,727.50
Morgan Stanley IRA - stocks: Aspen Insurance Holdings 5.625	\$ 9,910.00
Morgan Stanley IRA - stocks: Bank of Amer Corp 5.375%-KK	\$ 11,545.00
Morgan Stanley IRA - stocks: Citizens Finl GRP Inc 5.00%	\$ 10,005.00
Morgan Stanley IRA - stocks: Equitable Hldgs Inc 5.25%	\$ 10,767.50

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Description of Asset	Value of Asset
Morgan Stanley IRA - stocks: Morgan Stanley 4.875%SER-L	\$ 11,180.00
Morgan Stanley IRA - stocks: Siriuspoint Ltd Res Fic Pfd Sr	\$ 24,735.00
Morgan Stanley IRA - stocks: Triton Intl Ltd 8.50%	\$ 7,549.50
Morgan Stanley IRA - Municipal Bond (Columbia Cnty Fla Sch Brd Ctfs Part Re Ref-A)	\$ 10,042.20
Morgan Stanley IRA - Municipal Bond (M&T Bank Corp Fxd To 112026 Var Thrafr 5.1250%)	\$ 11,334.51
Morgan Stanley IRA - Municipal Bond (Goldman Sachs Group Inc/The)	\$ 17,843.31
Morgan Stanley IRA - Municipal Bond (Synchrony Financial)	\$ 17,832.87
Morgan Stanley IRA - Municipal Bond (General Motor Financial Co Inc)	\$ 9,841.75
Morgan Stanley IRA - Municipal Bond (Wynn Las Vegas Capital Corp Regs)	\$ 9,950.95
Morgan Stanley IRA - Municipal Bond (General Mills Inc)	\$ 14,811.08
Morgan Stanley IRA - Municipal Bond (Hewlett Packard Enterprise Co)	\$ 11,965.14
Morgan Stanley IRA - Municipal Bond (Amazon.com Inc)	\$ 12,151.08
Morgan Stanley IRA - Municipal Bond (Paramount Global)	\$ 16,586.22
Morgan Stanley IRA - Municipal Bond (Bank of America Corp)	\$ 12,771.07
Morgan Stanley IRA - Municipal Bond (Uber Technologies Inc Regs)	\$ 12,228.06
Morgan Stanley IRA - Municipal Bond (Discover Financial Servies)	\$ 35,532.95
Morgan Stanley IRA - Municipal Bond (General Mills Inc)	\$ 16,292.38
Morgan Stanley IRA - Municipal Bond (Cardinal Health Inc)	\$ 11,518.74
Morgan Stanley IRA - Municipal Bond (Conocophillips Co)	\$ 12,613.72
Morgan Stanley IRA - Municipal Bond (Morgan Stanley Finance LLC)	\$ 17,375.00
Morgan Stanley IRA - Securities: Aegon Funding Corg LLC 5.10% Notes 49	\$ 10,947.50
Morgan Stanley IRA - Securities: Ford Motor Co 6.2000%	\$ 11,920.00

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Description of Asset	Value of Asset
Morgan Stanley IRA-Securities: Nextera Energy Capital Holdings Inc 5.65%	\$ 12,250.00
Morgan Stanley IRA-Securities: Israel Govt Intl Bond 30 yr bond	\$ 26,992.13
Morgan Stanley IRA-Mutual Fund: Invesco Prem Us Govt Mny Inst	\$ 427,419.42
Morgan Stanley IRA-Mutual Fund: AAM Bahl & Gaynor Inc GW 1	\$ 37,420.38
Morgan Stanley IRA-Mutual Fund: Angel Oak Multi Strat Inc I	\$ 30,423.96
Morgan Stanley IRA-Mutual Fund: Delaware Value Instl	\$ 62,527.15
Morgan Stanley IRA-Mutual Fund: Dodge & Cox Balanced I	\$ 42,695.68
Morgan Stanley IRA-Mutual Fund: Fidelity Contra FD	\$ 87,344.11
Morgan Stanley IRA-Mutual Fund: Msift Core Plus Fixed Inc Inst	\$ 113,892.79
Morgan Stanley IRA-Mutual Fund: T Rowe Price Eqi-Inc	\$ 59,633.07
Morgan Stanley IRA-Mutual Fund: Vanguard Wellington Inv	\$ 39,446.78
Morgan Stanley TOD account: (cash)	\$ 1,917.08
Morgan Stanley TOD account-stocks: Alcon Inc	\$ 2,109.24
Morgan Stanley TOD account-stocks: Chermours Co Com	\$ 1,356.22
Morgan Stanley TOD account-stocks: Colgate Palmolive	\$ 7,971.00
Morgan Stanley TOD account-stocks: Corteva Inc	\$ 4,408.64
Morgan Stanley TOD account-stocks: Dominion Energy Inc	\$ 16,168.00
Morgan Stanley TOD account-stocks: Dow Inc	\$ 5,045.28
Morgan Stanley TOD account-stocks: Dupont De Nemours Inc	\$ 7,077.56
Morgan Stanley TOD account-stocks: Eli Lilly & Co	\$ 77,528.36
Morgan Stanley TOD account-stocks: Johnson & Johnson	\$ 25,705.36
Morgan Stanley TOD account-stocks: Nextera Energy Inc	\$ 75,925.00
Morgan Stanley TOD account-stocks: Novartis Ag Adr	\$ 13,630.95
Morgan Stanley TOD account-stocks: Pepsico Inc NC	\$ 34,307.68

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Description of Asset	Value of Asset
Morgan Stanley TOD account-stocks: Verizon Communications	\$ 5,089.50
Morgan Stanley TOD account-stocks: Wal Mart De Mexico SA SPON ADR	\$ 11,298.08
Morgan Stanley TOD account-stocks: Ishares Russell 2000ETF	\$ 15,053.25
Morgan Stanley TOD account-stocks: Vanguard Real Estate ETF	\$ 8,836.00
Morgan Stanley TOD account-Mutual Funds: Federated Hermes Govt Obl Prm	\$ 5,079.47
Morgan Stanley TOD account-Mutual Funds: BNY Mellon Core Plau A	\$ 13,734.28
Morgan Stanley TOD account-Mutual Funds: Fidelity Int'l Discovery Fund	\$ 6,894.92
Morgan Stanley TOD account-Mutual Funds: Harbor core Plus Fund Ins	\$ 17,059.55
Morgan Stanley TOD account-Mutual Funds: T Rowe Price Eqi-Inc	\$ 39,452.92
Morgan Stanley TOD account- Annuities: Jackson National Lif Elite Access II	\$ 111,606.68
Morgan Stanley IRA: cash	\$ 207,535.70
Morgan Stanley IRA-funds: Comm Serv Select Sector Spdr	\$ 4,173.40
Morgan Stanley IRA-funds: Cons Discret Sel Sect Spdr Fd	\$ 4,273.00
Morgan Stanley IRA-funds: First Trust Dorsey Wright FO	\$ 13,512.20
Morgan Stanley IRA-funds: First Trust RBA American Ind	\$ 4,202.25
Morgan Stanley IRA-funds: First Trust rising Div Achiev	\$ 5,135.00
Morgan Stanley IRA-funds: Invesco QQQ Trust, Series 1	\$ 16,678.80
Morgan Stanley IRA-funds: Ishares Latin Amer 40ETF	\$ 50,009.40
Morgan Stanley IRA-funds: Ishares MSCI India ETF	\$ 4,240.65
Morgan Stanley IRA-funds: Janus Small/Mid Cap Grw ETF	\$ 8,366.80
Morgan Stanley IRA-funds: Pacer US Cash Cows 100 ETF	\$ 10,342.00
Morgan Stanley IRA-funds: Pacer US Sml Cap Cash Chows ETF	\$ 8,242.50
Morgan Stanley IRA-funds: Spdr S7P Biotech	\$ 4,808.65

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Description of Asset	Value of Asset
Morgan Stanley IRA-funds: The Technology Sel Sec Sprd FD	\$ 3,953.60
Morgan Stanley IRA- cash	\$ 432,559.33
Morgan Stanley IRA -stocks: Advanced Micro Devices	\$ 17,104.38
Morgan Stanley IRA -stocks: Allstate Corp	\$ 20,182.50
Morgan Stanley IRA -stocks: Alphabet Inc Cl A	\$ 11,908.50
Morgan Stanley IRA -stocks: Amazon Com Inc	\$ 11,950.40
Morgan Stanley IRA -stocks: Costco Wholesale Corp New	\$ 11,812.96
Morgan Stanley IRA -stocks: Eaton Corp Plc Shs	\$ 12,057.92
Morgan Stanley IRA -stocks: Eli Lilly & Co	\$ 11,620.98
Morgan Stanley IRA -stocks: Exxon Mobil Corp	\$ 7,813.56
Morgan Stanley IRA -stocks: Howmet Aerospace Inc	\$ 40,282.16
Morgan Stanley IRA -stocks: Ingersoll Rand Inc	\$ 12,458.16
Morgan Stanley IRA -stocks: Medtronic Plc Shs	\$ 21,009.60
Morgan Stanley IRA -stocks: L3Harris Technologies Inc	\$ 6,044.18
Morgan Stanley IRA -stocks: Metlife Incorporated	\$ 31,817.88
Morgan Stanley IRA -stocks: Microsoft Corp	\$ 12,324.98
Morgan Stanley IRA -stocks: Novo Nordisk A/S ADR	\$ 12,965.62
Morgan Stanley IRA -stocks: Nvidia Corporation	\$ 11,690.13
Morgan Stanley IRA -stocks: Palo Alto Networks Inc	\$ 14,217.42
Morgan Stanley IRA -stocks: Salesforce Inc	\$ 39,914.78
Morgan Stanley IRA -exchange traded & closed end funds: Spdr Bloomberg 1-3 Month T-B	\$ 420,260.52
Morgan Stanley IRA -cash	\$ 135,174.19
Morgan Stanley IRA -stocks: Apollo Global Mgmt Inc Cl A	\$ 2,008.00
Morgan Stanley IRA -stocks: Ares Management Corp Cl A	\$ 3,037.00
Morgan Stanley IRA -stocks: Bain Cap Specialty Fin Inc	\$ 3,341.80
Morgan Stanley IRA -stocks: Carlyle Group Inc	\$ 2,891.40
Morgan Stanley IRA -stocks: Digital Realty Trust Inc	\$ 2,809.20
Morgan Stanley IRA -stocks: Enterprise Prod Prtnrs L.P.	\$ 2,007.00

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Description of Asset	Value of Asset
Morgan Stanley IRA -stocks: Equity Residential	\$ 2,708.55
Morgan Stanley IRA -stocks: Essex Property Trust Inc	\$ 2,332.70
Morgan Stanley IRA -stocks: KKR & Co Inc Cl A	\$ 3,030.30
Morgan Stanley IRA -stocks: Mplx Lp Com Unit Rep Ltd	\$ 2,891.25
Morgan Stanley IRA -stocks: New Mtn Fin Corp	\$ 3,413.20
Morgan Stanley IRA -stocks: Oneok Inc	\$ 4,777.50
Morgan Stanley IRA -stocks: Prologis Inc Com	\$ 2,533.80
Morgan Stanley IRA -stocks: Verizon Communications	\$ 2,964.50
Morgan Stanley IRA -exchange traded & closed end funds: Blackstone Long-Short Credit B	\$ 2,822.35
Morgan Stanley IRA -exchange traded & closed end funds: FT Vest S&P 500 Dividen Ari	\$ 6,898.50
Morgan Stanley IRA -exchange traded & closed end funds: Global X Mlp & Energy Infrac	\$ 3,351.75
Morgan Stanley IRA -exchange traded & closed end funds: Invesco Cef Income Composite	\$ 3,370.70
Morgan Stanley IRA -exchange traded & closed end funds: Ishares Mortgage Real Estate C	\$ 2,602.45
Morgan Stanley IRA -exchange traded & closed end funds: Main Street Capital Corp	\$ 3,622.40
Morgan Stanley IRA -exchange traded & closed end funds: Spdr Bloomberg 1-3 month T-B	\$ 3,212.30
State of Israel Bonds - child 1	\$ 1,800.00
State of Israel Bonds - child 2	\$ 1,800.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Morgan Stanley home mortgage	PO Box 94807, Palatine, IL 6004	\$ 267,329.50
Porsche Financial Services vehicle lease	75 Remittance Drive, Suite 1138, Chicago, IL 60675-1738	\$ 63,715.15
US Bank vessel lease	PO Box 790179, St. Louis, MO 63179-0179	\$ 34,289.10

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. Or attach a complete copy of your 2023 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☒ I elect to file a copy of my 2023 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
See Attached		

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
See Attached			

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

N/A

Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

Signature of Reporting Official or Candidate

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

Daliah H Weiss

Digitally signed: 04/11/2024

Filed with COE: 04/11/2024

a Employee's SSN [REDACTED]		b Employer identification number (EIN) [REDACTED]		OMB No. 1545-0047	
c Employer's name, address, and ZIP code [REDACTED]		1 Wages, tips, other compensation 213300.00	2 Federal tax withheld 50493.00	3 Social security wages 163200.00	Form W-2 Wage and Tax Statement 2023 Copy B To Be Filed with Employee's FEDERAL Tax Return. This information is being furnished to the Internal Revenue Service.
		4 SS tax withheld 3932.40	5 Medicare wages & tips 213300.00	6 Medicare tax withheld 3212.55	
		7 Social security tips	8 Alternative tax	9	
d Control number		10 Dependent care benefits	11 Nonqualified plan	12a	
e Employee's name, address, and ZIP code [REDACTED] WEISS [REDACTED]		Self ☐ 13 Statutory employee ☐ Retiree or plan ☐ Third party sick pay ☐		14 Other	12b
					12c
					12d
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
[REDACTED] USD		[REDACTED]			

a Employee's SSN [REDACTED]		b Employer identification number (EIN) [REDACTED]		OMB No. 1545-0047	
c Employer's name, address, and ZIP code [REDACTED]		1 Wages, tips, other compensation 213300.00	2 Federal tax withheld 50493.00	3 Social security wages 163200.00	Form W-2 Wage and Tax Statement 2023 Copy 2 To Be Filed With Employee's State, City, or Local Income Tax Return.
		4 SS tax withheld 3932.40	5 Medicare wages & tips 213300.00	6 Medicare tax withheld 3212.55	
		7 Social security tips	8 Alternative tax	9	
d Control number		10 Dependent care benefits	11 Nonqualified plan	12a	
e Employee's name, address, and ZIP code [REDACTED] WEISS [REDACTED]		Self ☐ 13 Statutory employee ☐ Retiree or plan ☐ Third party sick pay ☐		14 Other	12b
					12c
					12d
15 State	Employer's state ID No.	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
[REDACTED] GST		[REDACTED]			

a Employee's SSN [REDACTED]		b Employer identification number (EIN) [REDACTED]		OMB No. 1545-0047	
c Employer's name, address, and ZIP code [REDACTED]		This information is being furnished to the IRS. If you are required to file a tax return, a registered preparer or other handler may be required to file a tax return if taxable and you fail to report it.			
		1 Wages, tips, other compensation 213300.00	2 Federal tax withheld 50493.00	3 Social security wages 163200.00	Form W-2 Wage and Tax Statement 2023 Copy C For EMPLOYEE'S RECORDS. (See Notice to Employee.)
		4 SS tax withheld 3932.40	5 Medicare wages & tips 213300.00	6 Medicare tax withheld 3212.55	
		7 Social security tips	8 Alternative tax	9	
d Control No.		10 Dependent care benefits	11 Nonqualified plan	12a	
e Employee's name, address, and ZIP code [REDACTED] WEISS [REDACTED] FL [REDACTED]		Self ☐ 13 Statutory employee ☐ Retiree or plan ☐ Third party sick pay ☐		14 Other	12b
					12c
					12d
15 State	Employer's state ID No.	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
[REDACTED] GST		[REDACTED]			

a Employee's social security number
[REDACTED]

b Employer identification number (EIN)
59-6001874

c Employer's name, address, and ZIP code

State of Florida
Jimmy Patronis, Chief Financial Officer
200 E Gaines Street
Tallahassee, Florida 32399-0356

d Control number
016775 01/05

e Employee's first name, mi, and last name

DALIAH H WEISS
[REDACTED]

f Employee's address and ZIP code
15 State Employer's state ID number

Payroll organization code
22-20-15-00-110

Intradepartment number
0000000067

1 Wages, tips, other compensation	2 Federal income tax withheld
170,336.52	21,995.04
3 Social security wages	4 Social security tax withheld
160,200.00	9,932.40
5 Medicare wages and tips	6 Medicare tax withheld
181,934.88	2,638.06
7 Social security tips	10 Dependent care benefits
11 Nonqualified plans	12a See instructions for box 12
	G 6,000.00
13 Statutory employee Retirement plan Third-party sick pay	12b
	DD 22,609.44
14 Other	12c
125 4,676.64	
	12d
	12e
16 State wages, tips, etc.	17 State income tax
	18 Local wages, tips, etc.
	19 Local income tax
	20 Locality name

FORM **W-2** **WAGE AND TAX STATEMENT** **2023**

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

OMB No. 1545-0008
Department of the Treasury - Internal Revenue Service

a Employee's social security number
[REDACTED]

b Employer identification number (EIN)
59-6001874

c Employer's name, address, and ZIP code

State of Florida
Jimmy Patronis, Chief Financial Officer
200 E Gaines Street
Tallahassee, Florida 32399-0356

d Control number
016775 01/05

e Employee's first name, mi, and last name

DALIAH H WEISS
[REDACTED]

f Employee's address and ZIP code
15 State Employer's state ID number

Payroll organization code
22-20-15-00-110

Intradepartment number
0000000067

1 Wages, tips, other compensation	2 Federal income tax withheld
170,336.52	21,995.04
3 Social security wages	4 Social security tax withheld
160,200.00	9,932.40
5 Medicare wages and tips	6 Medicare tax withheld
181,934.88	2,638.06
7 Social security tips	10 Dependent care benefits
11 Nonqualified plans	12a See instructions for box 12
	G 6,000.00
13 Statutory employee Retirement plan Third-party sick pay	12b
	DD 22,609.44
14 Other	12c
125 4,676.64	
	12d
	12e
16 State wages, tips, etc.	17 State income tax
	18 Local wages, tips, etc.
	19 Local income tax
	20 Locality name

FORM **W-2** **WAGE AND TAX STATEMENT** **2023**

Copy C - For EMPLOYEE'S RECORDS
AA327W Rev. 06/09/2023

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

IRS e-file Signature Authorization

▶ ERO must obtain and retain completed Form 8879.

▶ Go to www.irs.gov/Form8879 for the latest information.

OMB No. 1545-0074

Submission Identification Number (SID) ▶

Taxpayer's name

Weiss

Social security number

Spouse's name

Daliah Handel Weiss

Spouse's social security number

Part I Tax Return Information – Tax Year Ending December 31, 2023 (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income.....	1	428,416.
2	Total tax.....	2	86,098.
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099.....	3	72,598.
4	Amount you want refunded to you.....	4	
5	Amount you owe.....	5	629.

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

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

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

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶

Date ▶

Spouse's PIN: check one box only

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

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

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶

Date ▶

Practitioner PIN Method Returns Only – continue below**Part III Certification and Authentication – Practitioner PIN Method Only****ERO's EFIN/PIN.** Enter your six-digit EFIN followed by your five-digit self-selected PIN.
Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ▶

Date ▶

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

BAA For Paperwork Reduction Act Notice, see your tax return instructions.**Form 8879 (Rev. 01-2021)**

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning _____, ending _____ See separate instructions.

Your first name and middle initial _____ Last name _____ Your social security number _____

If joint return, spouse's first name and middle initial _____ Last name _____ Spouse's social security number _____

Daliah Handel Weiss

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. _____

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

Foreign country name _____ Foreign province/state/county _____ Foreign postal code _____

☐ You ☐ Spouse

Filing Status

☐ Single ☐ Head of household (HOH)

Check only one box. ☒ Married filing jointly (even if only one had income)

☐ Married filing separately (MFS) ☐ Qualifying surviving spouse (QSS)

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: _____

Digital Assets At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, 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, 1959 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1959 ☐ 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 instructions):	Child tax credit	Credit for other dependents
Weiss			Son			☒
Weiss			Daughter			☒

Income

1a Total amount from Form(s) W-2, box 1 (see instructions) **1a** 383,637.

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** 383,637.

2a Tax-exempt interest **2a** 17,311. **b** Taxable interest **2b** 10,291.

3a Qualified dividends **3a** 13,462. **b** Ordinary dividends **3b** 16,284.

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

5a Pensions and annuities **5a** 123,786. **b** Taxable amount **5b** 14,564.

6a Social security benefits **6a** **b** Taxable amount **6b**

c If you elect to use the lump-sum election method, check here (see instructions) ☐

7 Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐ **7** 1,455.

8 Additional income from Schedule 1, line 10 **8** 2,185.

9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** **9** 428,416.

10 Adjustments to income from Schedule 1, line 26 **10**

11 Subtract line 10 from line 9. This is your **adjusted gross income** **11** 428,416.

12 **Standard deduction or itemized deductions** (from Schedule A) **12** 27,700.

13 Qualified business income deduction from Form 8995 or Form 8995-A **13** 53.

14 Add lines 12 and 13 **14** 27,753.

15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income** **15** 400,663.

Tax and Credits16 Tax (see instructions). Check if any from Form(s): 1 ☐ 88142 ☐ 4972 3 ☐

17 Amount from Schedule 2, line 3

18 Add lines 16 and 17

19 Child tax credit or credit for other dependents from Schedule 8812

20 Amount from Schedule 3, line 8

21 Add lines 19 and 20

22 Subtract line 21 from line 18. If zero or less, enter -0-

23 Other taxes, including self-employment tax, from Schedule 2, line 21

24 Add lines 22 and 23. This is your **total tax**

16 83,341.

17

18 83,341.

19

20 188.

21 188.

22 83,153.

23 2,945.

24 86,098.

Payments

25 Federal income tax withheld from:

a Form(s) W-2 25a 72,478.

b Form(s) 1099 25b

c Other forms (see instructions) 25c 120.

d Add lines 25a through 25c 25d 72,598.

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

26 2023 estimated tax payments and amount applied from 2022 return 26 13,000.

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** 3233 Add lines 25d, 26, and 32. These are your **total payments** 33 85,598.**Refund**34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid** 3435a Amount of line 34 you want **refunded to you**. If Form 8888 is attached, check here ☐ 35ab Routing number c Type: ☐ Checking ☐ Savings

d Account number

36 Amount of line 34 you want **applied to your 2024 estimated tax** 36Direct deposit?
See instructions.**Amount You Owe**37 Subtract line 33 from line 24. This is the **amount you owe**.For details on how to pay, go to www.irs.gov/Payments or see instructions. 37 629.

38 Estimated tax penalty (see instructions) 38 129.

Third Party Designee

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

See instructions ☒ Yes. Complete below. ☐ No

Designee's name

Scott A. Stein, CPA

Phone no.

561-686-1110

Personal identification number (PIN)

Sign Here

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

Your signature

Date

Your occupation

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

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

Date

Spouse's occupation

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

Phone no.

Email address

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

Attorney

Judge

Paid Preparer Use Only

Preparer's name

Scott A. Stein, CPA

Preparer's signature

Date

3/27/24

PTIN

Check if:

☐ Self-employed

Firm's name

DIVINE, BLALOCK, MARTIN & SELLARI, LLC

Phone no. 561-686-1110

Firm's address

580 VILLAGE BLVD, SUITE 110
WEST PALM BEACH, FL 33409

Firm's EIN

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

Form 1040 (2023)

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

2023

Attachment
Sequence No. **01**

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

and Daliah Handel Weiss

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	1,860.
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling	8b	
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Income from Form 8853	8e	
f	Income from Form 8889	8f	
g	Alaska Permanent Fund dividends	8g	
h	Jury duty pay	8h	
i	Prizes and awards	8i	
j	Activity not engaged in for profit income	8j	
k	Stock options	8k	
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l	
m	Olympic and Paralympic medals and USOC prize money (see instructions) ..	8m	
n	Section 951(a) inclusion (see instructions)	8n	
o	Section 951A(a) inclusion (see instructions)	8o	
p	Section 461(l) excess business loss adjustment	8p	
q	Taxable distributions from an ABLE account (see instructions)	8q	
r	Scholarship and fellowship grants not reported on Form W-2	8r	
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	()
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t	
u	Wages earned while incarcerated	8u	
z	Other income. List type and amount: <u>See Statement 1</u>	8z	325.
9	Total other income. Add lines 8a through 8z	9	325.
10	Combine lines 1 through 7 and 9. This is your additional income . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	2,185.

Part II Adjustments to Income

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

Schedule 1 (Form 1040) 2023

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

2023

Attachment
Sequence No. **02**

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

and Daliah Handel Weiss

Your social security number

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE.....	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137.....	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919.....	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6.....	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here. ☐	8	
9	Household employment taxes. Attach Schedule H.....	9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required.....	10	
11	Additional Medicare Tax. Attach Form 8959.....	11	1,307.
12	Net investment income tax. Attach Form 8960	12	1,638.
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12.....	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares.....	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000.....	15	
16	Recapture of low-income housing credit. Attach Form 8611.....	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2023

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	2,945.

Schedule 2 (Form 1040) 2023

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

2023

Attachment
Sequence No. **03**

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

and Daliah Handel Weiss

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required.	1	188.
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	
5a	Residential clean energy credit from Form 5695, line 15.	5a	
b	Energy efficient home improvement credit from Form 5695, line 32.	5b	
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	Reserved for future use.	6e	
f	Clean 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	
m	Credit for previously owned clean vehicles. Attach Form 8936.	6m	
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 4, 5a, 5b, and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20.	8	188.

(continued on page 2)

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

Schedule 3 (Form 1040) 2023

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 repayment of amounts included in income from earlier years.....	13b		
c	Elective payment election amount from Form 3800, Part III, line 6, column (i).....	13c		
d	Deferred amount of net 965 tax liability (see instructions).....	13d		
z	Other payments or refundable credits. List type and amount:	13z		
14	Total other payments or refundable credits. Add lines 13a through 13z ..		14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31.		15	0.

Schedule 3 (Form 1040) 2023

SCHEDULE B
(Form 1040)

Department of the Treasury
Internal Revenue Service

Interest and Ordinary Dividends

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

OMB No. 1545-0074

2023

Attachment
Sequence No. **08**

Name(s) shown on return

and Daliah Handel Weiss

Your social security number

Part I

Interest

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

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

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

Bank of America

Rvic Tr Dated 4-19-2000

Morgan Stanley

Morgan Stanley

Amount

46.

9,516.

1.

728.

1

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

10,291.

10,291.

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

Amount

Part II

**Ordinary
Dividends**

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

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

- 5 List name of payer:

Rvic Tr Dated 4-19-2000

Morgan Stanley

Morgan Stanley

5,392.

513.

10,379.

5

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

16,284.

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

Part III

**Foreign
Accounts
and Trusts**

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

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

- 7a At any time during 2023, 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) is (are) located:
- 8 During 2023, 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.

Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

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

OMB No. 1545-0074

2023Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

[REDACTED] and Daliah Handel Weiss

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

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

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

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

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

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

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

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

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

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions. See the instrs.				13 1,455.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on the back				15 1,455.

Part III Summary

16 Combine lines 7 and 15 and enter the result.....	16	1,455.
• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.		
17 Are lines 15 and 16 both gains?		
☒ Yes. Go to line 18.		
☐ No. Skip lines 18 through 21, and go to line 22.		
18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet.....	18	0.
19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet.....	19	2.
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952?		
☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below.		
☒ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:		
• The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500)	21	()
Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?		
☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16.		
☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Name(s) shown on return. Do not enter name and social security number if shown on Page 1.

Your social security number

[REDACTED] and Daliah Handel Weiss

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						
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 4562	(k) Nonpassive income from Schedule K-1
A					
B					
C					
D					
29 a Totals					
b Totals					
30 Add columns (h) and (k) of line 29a				30	
31 Add columns (g), (i), and (j) of line 29b				31	
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31				32	

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer ID no.
A	[REDACTED] Rvic Tr Dated 4-19-2000	[REDACTED]
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				1,860.
B				
34 a Totals				1,860.
b Totals				
35 Add columns (d) and (f) of line 34a			35	1,860.
36 Add columns (c) and (e) of line 34b			36	
37 Total estate and trust income or (loss). Combine lines 35 and 36			37	1,860.

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	1,860.
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 AN; 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 1116

Department of the Treasury
Internal Revenue Service

Foreign Tax Credit

(Individual, Estate, or Trust)

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

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

OMB No. 1545-0121

2023

Attachment
Sequence No. 19

Name

and Daliah Handel Weiss

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

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

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

h Resident of (name of country) USA

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

	Foreign Country or U.S. Possession			Total (Add columns A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession.	OTHER COUNTRY			
1 a Gross income from sources within country shown above and of the type checked above (see instructions): See Statement 2	1,051.			1 a 1,051.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions. ☐				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions)	27,700.			
b Other deductions (attach statement)				
c Add lines 3a and 3b	27,700.			
d Gross foreign source income (see instructions)	2,592.			
e Gross income from all sources (see instructions)	428,416.			
f Divide line 3d by line 3e (see instructions)	0.006050			
g Multiply line 3c by line 3f	168.			
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	168.			6 168.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 883.

Part II Foreign Taxes Paid or Accrued (see instructions)

COUNTRY	Credit is claimed for taxes (you must check one) (j) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued							(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add columns (q) through (t))
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:				Taxes withheld at source on:				
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends	(r) Rents and royalties		
A	1099 taxes						232.			232.
B										
C										

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 8 232.

BAA For Paperwork Reduction Act Notice, see instructions.

08/11/23

Form 1116 (2023)

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I.	9	232.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. If you enter an amount on line 10 and you don't need to attach Schedule B, check here (see instructions). ☐ See Stmt 3. (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10	120,244.	
11	Add lines 9 and 10.	11	120,476.	
12	Reduction in foreign taxes (see instructions).	12		
13	Taxes reclassified under high tax kickout (see instructions).	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit.	14	120,476.	
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions.	15	883.	
16	Adjustments to line 15 (see instructions).	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	883.	
18	Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption.	18	391,794.	
19	Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions. Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19	0.002253735	
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions.	20	83,341.	
21	Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions. Multiply line 20 by line 19 (maximum amount of credit).	21	188.	
22	Increase in limitation (section 960(c)) (see instructions).	22		
23	Add lines 21 and 22.	23	188.	
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV. See instructions.	24	188.	

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

25	Credit for taxes on section 951A category income.	25		
26	Credit for taxes on foreign branch category income.	26		
27	Credit for taxes on passive category income.	27		
28	Credit for taxes on general category income.	28		
29	Credit for taxes on section 901(j) income.	29		
30	Credit for taxes on certain income re-sourced by treaty.	30		
31	Credit for taxes on lump-sum distributions.	31		
32	Add lines 25 through 31.	32		
33	Enter the smaller of line 20 or line 32.	33	188.	
34	Reduction of credit for international boycott operations. See instructions for line 12.	34		
35	Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a.	35	188.	

Form 1116

Alternative Minimum Tax

Foreign Tax Credit

(Individual, Estate, or Trust)

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

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

OMB No. 1545-0121

2023

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

Name

and Daliah Handel Weiss

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

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

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

h Resident of (name of country) USA

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for category checked above)

	Foreign Country or U.S. Possession			Total (Add columns A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession.	OTHER COUNTRY			
1 a Gross income from sources within country shown above and of the type checked above (see instructions): <u>See Statement 4</u>	1,388.			1 a 1,388.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions. ☐				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions)				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income (see instructions)	2,592.			
e Gross income from all sources (see instructions)	428,416.			
f Divide line 3d by line 3e (see instructions)	0.006050			
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5				6
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 1,388.

Part II Foreign Taxes Paid or Accrued (see instructions)

COUNTRY	Credit is claimed for taxes (you must check one) (j) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:				Taxes withheld at source on:				
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends	(r) Rents and royalties	(s) Interest	(t) Other foreign taxes paid or accrued
A	1099 taxes					232.				232.
B										
C										

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 **8** 232.

BAA For Paperwork Reduction Act Notice, see instructions.

08/11/23

Form 1116 (2023)

Alternative Minimum Tax

Form 1116 (2023) [REDACTED] and Daliah Handel Weiss

Page 2

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I.	9	232.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. If you enter an amount on line 10 and you don't need to attach Schedule B, check here (see instructions). ☐ See Stmt. 5. (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10	121,470.	
11	Add lines 9 and 10.	11	121,702.	
12	Reduction in foreign taxes (see instructions).	12		
13	Taxes reclassified under high tax kickout (see instructions).	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit.	14	121,702.	
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions.	15	1,388.	
16	Adjustments to line 15 (see instructions).	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	1,388.	
18	Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption.	18	422,270.	
Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.				
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19	0.003286996	
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions.	20	78,402.	
Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.				
21	Multiply line 20 by line 19 (maximum amount of credit).	21	258.	
22	Increase in limitation (section 960(c)) (see instructions).	22		
23	Add lines 21 and 22.	23	258.	
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV. See instructions.	24	258.	

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

25	Credit for taxes on section 951A category income.	25		
26	Credit for taxes on foreign branch category income.	26		
27	Credit for taxes on passive category income.	27		
28	Credit for taxes on general category income.	28		
29	Credit for taxes on section 901(j) income.	29		
30	Credit for taxes on certain income re-sourced by treaty.	30		
31	Credit for taxes on lump-sum distributions.	31		
32	Add lines 25 through 31.	32		
33	Enter the smaller of line 20 or line 32.	33	258.	
34	Reduction of credit for international boycott operations. See instructions for line 12.	34		
35	Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a.	35	258.	

SCHEDULE B
(Form 1116)

Foreign Tax Carryover Reconciliation Schedule

(Rev. December 2022)

Department of the Treasury
Internal Revenue Service

For calendar year 2023, or other tax year beginning _____, and ending _____
See separate instructions.
Attach to Form 1116.
Go to www.irs.gov/Form1116 for instructions and the latest information.

OMB No. 1545-0121

Name and Daliah Handel Weiss Identifying number as shown on page 1 of your tax return [REDACTED]

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

- a** ☐ Reserved for future use **c** ☒ Passive category income **e** ☐ Section 901 (g) income **g** ☐ Lump-sum distributions
b ☐ Foreign branch category income **d** ☐ General category income **f** ☐ Certain income re-sourced by treaty
h If box e is checked, enter the country code for the sanctioned country. See instructions.
i If box f is checked, enter the country code for the treaty country. See instructions.

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

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

01/10/23

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

Foreign Tax Carryover Reconciliation (continued)		(viii) Subtotal from page 1 (enter the amounts from column (vii) on page 1)	(ix) 4th Preceding Tax Year	(x) 3rd Preceding Tax Year	(xi) 2nd Preceding Tax Year	(xii) 1st Preceding Tax Year	(xiii) Current Tax Year	(xiv) Totals (add columns (viii) through (xiii))
1	Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))	120,244.						120,244.
2	Adjustments to line 1 (enter description—see instructions):							
a	Carryback adjustment (see instr.)							
b	Adjustments for section 905(c) redeterminations (see instructions)							
c								
d								
e								
f								
g								
3	Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2). Include the column (xiv) total on the current year Form 1116, Part III, line 10.	120,244.						120,244.
4	Foreign tax carryover used in current tax year (enter as a negative number)							
5	Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6	Foreign tax carryover generated in current tax year						44.	44.
7	Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8	Foreign tax carryover to the following tax year. Combine lines 3 through 7.	120,244.					44.	120,288.

BAA

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

SCHEDULE B
(Form 1116)

Foreign Tax Carryover Reconciliation Schedule

(Rev. December 2022)

Department of the Treasury
Internal Revenue Service

For calendar year 2023, or other tax year beginning _____, and ending _____.
See separate instructions.
Attach to Form 1116.
Go to www.irs.gov/Form1116 for instructions and the latest information.

OMB No. 1545-0121

Name

and Daliah Handel Weiss

Alternative Minimum Tax

Identifying number as shown
on page 1 of your tax return

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

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

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

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

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

Foreign Tax Carryover Reconciliation		(i) 10th Preceding Tax Year	(ii) 9th Preceding Tax Year	(iii) 8th Preceding Tax Year	(iv) 7th Preceding Tax Year	(v) 6th Preceding Tax Year	(vi) 5th Preceding Tax Year	(vii) Subtotal (add columns (i) through (vi))
1	Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))				121,470.			121,470.
2	Adjustments to line 1 (enter description—see instructions):							
a	Carryback adjustment (see instr.)							
b	Adjustments for section 905(c) redeterminations (see instructions)							
c								
d								
e								
f								
g								
3	Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2)				121,470.			121,470.
4	Foreign tax carryover used in current tax year (enter as a negative number)				-26.			-26.
5	Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6	Foreign tax carryover generated in current tax year							
7	Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8	Foreign tax carryover to the following tax year. Combine lines 3 through 7.	-0-			121,444.			121,444.

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

01/10/23

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

Alternative Minimum Tax

	(viii) Subtotal from page 1 (enter the amounts from column (vii) on page 1)	(ix) 4th Preceding Tax Year	(x) 3rd Preceding Tax Year	(xi) 2nd Preceding Tax Year	(xii) 1st Preceding Tax Year	(xiii) Current Tax Year	(xiv) Totals (add columns (viii) through (xiii))
Foreign Tax Carryover Reconciliation (continued)							
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))	121,470.						121,470.
2 Adjustments to line 1 (enter description—see instructions):							
a Carryback adjustment (see instr.)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2). Include the column (xiv) total on the current year Form 1116, Part III, line 10.	121,470.						121,470.
4 Foreign tax carryover used in current tax year (enter as a negative number)	-26.						-26.
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.	* 121,444.						121,444.

BAA

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

Qualified Business Income Deduction

OMB No. 1545-2294

2023Attachment
Sequence No. **55A**Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on return

Your taxpayer identification number

[REDACTED] and Daliah Handel Weiss

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

Use this form if your taxable income, before your qualified business income deduction, is above \$182,100 (\$364,200 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 \$182,100 or less (\$364,200 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13.	3		
4 Allocable share of W-2 wages from the trade, business, or aggregation	4		
5 Multiply line 4 by 50% (0.50)	5		
6 Multiply line 4 by 25% (0.25)	6		
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property.	7		
8 Multiply line 7 by 2.5% (0.025)	8		
9 Add lines 6 and 8	9		
10 Enter the greater of line 5 or line 9	10		
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	11		
12 Phased-in reduction. Enter the amount from line 26, if any	12		
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	13		
14 Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions	14		
15 Qualified business income component. Subtract line 14 from line 13	15		
16 Total qualified business income component. Add all amounts reported on line 15	16		

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

Form 8995-A (2023)

Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$182,100 but not \$232,100 (\$364,200 and \$464,200 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 \$182,100 (\$364,200 if married filing jointly).....	21			
22 Subtract line 21 from line 20....	22			
23 Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly).....	23			
24 Phase-in percentage. Divide line 22 by line 23.....	24	%		
25 Total phase-in reduction. Multiply line 19 by line 24.....	25			
26 Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business.....	26			

Part IV Determine Your Qualified Business Income Deduction

27 Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16.....	27			
28 Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions.....	28	267.		
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	267.		
31 REIT and PTP component. Multiply line 30 by 20% (0.20).....	31	53.		
32 Qualified business income deduction before the income limitation. Add lines 27 and 31.....	32		53.	
33 Taxable income before qualified business income deduction.....	33	400,716.		
34 Enter your net capital gain, if any, increased by any qualified dividends (see instructions).....	34	14,917.		
35 Subtract line 34 from line 33. If zero or less, enter -0-.....	35		385,799.	
36 Income limitation. Multiply line 35 by 20% (0.20).....	36		77,160.	
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		53.	
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		53.	
40 Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-.....	40	()		

Form 8995-A (2023)

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, or 1040-SS.
 Go to www.irs.gov/Form8959 for instructions and the latest information.

2023Attachment
Sequence No. **71**

Your social security number

[REDACTED] and Daliah Handel Weiss

[REDACTED]

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	395,235.		
2	Unreported tips from Form 4137, line 6	2			
3	Wages from Form 8919, line 6	3			
4	Add lines 1 through 3.	4	395,235.		
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		145,235.	
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II.	7		1,307.	

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-	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 (RTTA) Compensation

14	Railroad retirement (RTTA) 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 (RTTA) 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-SS filers, see instructions), and go to Part V.	18	1,307.
----	---	----	--------

Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6.	19	5,851.		
20	Enter the amount from line 1.	20	395,235.		
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages.	21	5,731.		
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		120.	
23	Additional Medicare Tax withholding on railroad retirement (RTTA) 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-SS filers, see instructions).	24		120.	

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

Attach to your tax return.

Go to www.irs.gov/Form8960 for instructions and the latest information.

OMB No. 1545-2227

2023

Attachment
Sequence No. **72**

Name(s) shown on your tax return

and Daliah Handel Weiss

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	10,291.
2	Ordinary dividends (see instructions).....	2	16,284.
3	Annuities (see instructions).....	3	14,564.
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions).....	4a	1,860.
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions).....	4b	
c	Combine lines 4a and 4b.....	4c	1,860.
5a	Net gain or loss from disposition of property (see instructions).....	5a	1,455.
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	1,455.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions).....	6	
7	Other modifications to investment income (see instructions).....	7	-1,351.
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7.....	8	43,103.

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	43,103.
13	Modified adjusted gross income (see instructions).....	13	428,416.
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	178,416.
16	Enter the smaller of line 12 or line 15.....	16	43,103.
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	1,638.
18a	Net investment income (line 12 above).....	18a	
b	Deductions for distributions of net investment income and charitable deductions (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	

2023

Federal Statements

Page 1

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

Statement 1
Schedule 1, Line 8z
Other Income

PS 58 Total \$ 325.
Total \$ 325.

Statement 2
Form 1116, Line 1a - Passive Category Income
Gross Income From Sources Outside U.S.

Foreign country or U.S. possession: OTHER COUNTRY

Gross Foreign Source Qualified Dividends.....	1,137.	
Foreign Source Qualified Dividend Adjustment.....	-676.	
Net Foreign Source Qualified Dividends.....		\$ 461.
Capital Gain Distributions.....	1,455.	
Capital Gain Distributions Adjustment.....	-865.	
Net Foreign Source Capital Gain Distributions.....		590.
	Total \$	<u>1,051.</u>

Statement 3
Form 1116, Line 10
Foreign Tax Credit Carryovers

Passive Income

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

Total Foreign Tax Credit Carryover - Form 1116, Line 10 \$ 120,244.

Statement 4
Form 1116, Line 1a - Passive Category Income (AMT)
Gross Income From Sources Outside U.S.

Foreign country or U.S. possession: OTHER COUNTRY

Gross Foreign Source Qualified Dividends.....	1,137.	
Foreign Source Qualified Dividend Adjustment.....	-528.	
Net Foreign Source Qualified Dividends.....		\$ 609.
Capital Gain Distributions.....	1,455.	
Capital Gain Distributions Adjustment.....	-676.	

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

Statement 4 (continued)
Form 1116, Line 1a - Passive Category Income (AMT)
Gross Income From Sources Outside U.S.

Net Foreign Source Capital Gain Distributions..... Total \$ 779.
\$ 1,388.

Statement 5
Form 1116, Line 10
Foreign Tax Credit Carryovers

Passive Income - AMT

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

Total Foreign Tax Credit Carryover - Form 1116, Line 10 \$ 121,470.

Client WEISS

and Daliah Handel Weiss

	2023	2022	Diff
INCOME			
Wages, salaries, tips, etc.....	383,637	351,929	31,708
Interest income.....	10,291	74	10,217
Dividend income.....	16,284	9,144	7,140
Taxable pensions.....	14,564	0	14,564
Capital gain or loss.....	1,455	8,894	-7,439
Rent, royalty, partnership, SCorp, trust	1,860	0	1,860
Other income.....	325	311	14
Total income.....	428,416	370,352	58,064
ADJUSTMENTS TO INCOME			
Total adjustments.....	0	0	0
Adjusted gross income.....	428,416	370,352	58,064
ITEMIZED DEDUCTIONS			
Taxes.....	10,000	2,524	7,476
Interest.....	7,326	7,524	-198
Contributions.....	1,030	700	330
Total itemized deductions.....	18,356	10,748	7,608
TAX COMPUTATION			
Standard deduction.....	27,700	25,900	1,800
Larger of itemized or standard deduction	27,700	25,900	1,800
Qualified business income deduction.....	53	47	6
Taxable income.....	400,663	344,405	56,258
Tax before credits.....	83,341	69,817	13,524
CREDITS			
Child tax credit & other dependent cr....	0	1,000	-1,000
Foreign tax credit.....	188	420	-232
Total credits.....	188	1,420	-1,232
Tax after credits.....	83,153	68,397	14,756
OTHER TAXES			
Other taxes.....	2,945	1,706	1,239
Total tax.....	86,098	70,103	15,995
PAYMENTS & REFUNDABLE CREDITS			
Federal income tax withheld.....	72,598	64,381	8,217
Estimated tax payments.....	13,000	0	13,000
Total payments.....	85,598	64,381	21,217
REFUND OR AMOUNT DUE			
Underpayment penalty.....	129	0	129
Amount you owe.....	629	5,722	-5,093
TAX RATES			
Ordinary income tax bracket.....	32.0%	24.0%	8.0%
Effective tax rate.....	21.5%	20.4%	1.1%

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

Forms needed for this returnFederal: 1040, Sch 1, Sch 2, Sch 3, 1040-ES, 1040-V, Sch B, Sch D, Sch E p2
1116, 1116 Sch B, 8879, 8959, 8960, 8995-A**Tax Rates**

	<u>Marginal</u>	<u>Effective</u>
Federal	32.0%	21.5%

Underpayment Penalty

Federal	129.
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Carryovers to 2024Federal Carryovers

Foreign Tax Credit	120,288.
AMT Foreign Tax Credit	121,444.

Estimates**Federal Estimates**

	<u>Estimate</u>	<u>Overpayment</u>	<u>Balance</u>
4/15/24	5,530.	0.	5,530.
6/17/24	5,530.	0.	5,530.
9/16/24	5,530.	0.	5,530.
1/15/25	5,530.	0.	5,530.
Total	\$ 22,120.	\$ 0.	\$ 22,120.

Client WEISS [REDACTED] and Daliah Handel Weiss

Retirement Contributions

- ☐ For the purpose of determining tax savings on issues listed below, the Qualified Business Income Deduction was not re-computed. Tax savings amount(s) will generally be lower.
- ☐ The taxpayer and spouse saved an estimated \$1,920 in tax by contributing \$6,000 in pre-tax elective deferrals to employer-provided retirement plan(s).
- ☐ Consider making nondeductible traditional IRA contributions. In tax year 2010 and beyond, the \$100,000 traditional to Roth IRA conversion income limit no longer applies. You can maximize that opportunity by making nondeductible traditional IRA contributions and converting the amount(s) to Roth IRAs in subsequent years. Warning: if you have an existing traditional IRA account with prior contributions and earnings, doing this may cause a large amount of tax due in the year of conversion.
- ☐ The taxpayer could make a nondeductible traditional IRA contribution of \$7,500 for tax year 2023 and \$8,000 for tax year 2024 (assuming no other changes). The 2023 contribution must be made on or before April 15th, 2024.
- ☐ The spouse could make a nondeductible traditional IRA contribution of \$7,500 for tax year 2023 and \$8,000 for tax year 2024 (assuming no other changes). The 2023 contribution must be made on or before April 15th, 2024.

Future Tax Savings

- ☐ For the purpose of determining tax savings on issues listed below, the Qualified Business Income Deduction was not re-computed. Tax savings amount(s) will generally be lower.
- ☐ If the taxpayer or spouse has access to an employer-provided cafeteria plan for health care reimbursement, the taxpayer or spouse should consider participating. Contributions to such plans reduce taxable wages. However, due to the use-it-or-lose-it nature of such plans, conservative contributions should be made.
- ☐ The spouse contributed \$6,000 to an employer-provided retirement plan in 2023. Based on the spouse's age, the maximum allowable contributions for most plans will be \$30,500 in 2024. Increasing the pre-tax contributions by \$24,500 will result in an additional estimated tax savings of \$6,028.

Tax Tips

- ☐ Taxable income excluding capital gains and qualified dividends is \$385,746, placing the taxpayer in a 32% marginal tax bracket on ordinary income. Based on 2023 tax rates, ordinary income would have to increase by over \$76,754 in order for any ordinary income to begin being taxed in the 35% bracket. This may be used as a guide in determining the advantages or disadvantages of receiving discretionary ordinary income in 2024.

Client WEISS [REDACTED] and Daliah Handel Weiss

Tax Tips (continued)

- ☐ Paying discretionary itemized deductions (Property Taxes and Gifts to Charity) before the end of the year, or postponing discretionary itemized deductions until after the year end, could prove to be beneficial to this taxpayer, since itemized deductions are very close in value to the standard deduction. However, caution should be exercised. If the taxpayer is subject to AMT or close to being subject to AMT, the expected benefits from property tax payments may be reduced.
- ☐ Although the taxpayer is not subject to AMT, tentative minimum tax is currently 94% of regular tax. Consider reviewing next year's income and deduction items to see first if the taxpayer will be subject to AMT, and if AMT applies, review preference and adjustment items to see if any can be postponed or eliminated.

2024

Record of Estimated Tax Payments

Page 1

Client WEISS [REDACTED] and Daliah Handel Weiss

Federal

Payment Number	Date Due	2023 Overpayment Credit Applied	Balance Due	Check or money order number or credit card confirmation number	Amount Paid (do not include any credit card convenience fee)	Date paid
1	4/15/24		5,530.			
2	6/17/24		5,530.			
3	9/16/24		5,530.			
4	1/15/25		5,530.			
5						
6						
7						
8						
Total			22,120.			

State: _____

State

Payment Number	Date Due	2023 Overpayment Credit Applied	Balance Due	Check or money order number or credit card confirmation number	Amount Paid (do not include any credit card convenience fee)	Date paid
1						
2						
3						
4						
5						
6						
7						
8						
Total						

This document is for your records. Please use it to record your estimated tax payments and bring it with you for reference in the preparation of your 2024 tax return.

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

Wage Schedule

<u>Taxpayer - Employer</u>	<u>Wages</u>	<u>Federal W/H</u>	<u>FICA</u>	<u>Medi-care</u>	<u>State W/H</u>	<u>Local W/H</u>
[REDACTED]	213,300.	50,483.	9,932.	3,213.		
Total	213,300.	50,483.	9,932.	3,213.	0.	0.
<u>Spouse - Employer</u>	<u>Wages</u>	<u>Federal W/H</u>	<u>FICA</u>	<u>Medi-care</u>	<u>State W/H</u>	<u>Local W/H</u>
State of Florida	170,337.	21,995.	9,932.	2,638.		
Total	170,337.	21,995.	9,932.	2,638.	0.	0.
Grand Total	383,637.	72,478.	19,864.	5,851.	0.	0.

Pension and Annuities Schedule

<u>Spouse - Payer</u>	<u>Total Received</u>	<u>Taxable Amount</u>	<u>Federal W/H</u>	<u>State W/H</u>
Jackson National Life Ins Co of NY	3,054.	3,054.		
SE2 As Admin for Allstate	16,510.	11,510.		
Pacific Life Insurance Co	104,222.			
Grand Total	123,786.	14,564.	0.	0.

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

[REDACTED] Rvic Tr Dated 4-19-2000	4,583.
Morgan Stanley-[REDACTED]	97.
Morgan Stanley-[REDACTED]	8,782.
Total	13,462.

Client WEISS [REDACTED] and Daliah Handel Weiss

QTP Distribution Worksheet

Beneficiary - [REDACTED] Weiss

1. Total distributed earnings from QTP's	1,945.
2. Adjusted higher education expenses allocated to QTP's	7,400.
3. Adjusted elementary and secondary school expenses allocated to QTP's (\$10,000 max)	0.
4. Total adjusted education expenses allocated to QTP's	7,400.
5. Total amount of QTP's distributed	7,400.
6. QTP factor (divide line 4 by line 5)	1.0000
7. Nontaxable amount of QTP earnings (line 1 x line 6)	1,945.
8. Taxable amount of QTP earnings (subtract line 7 from line 1)	0.
9. Taxable rollovers	0.
10. Taxable amount of all QTP's (add line 8 and 9)	0.

Beneficiary - [REDACTED] Weiss

1. Total distributed earnings from QTP's	12,219.
2. Adjusted higher education expenses allocated to QTP's	25,602.
3. Adjusted elementary and secondary school expenses allocated to QTP's (\$10,000 max)	0.
4. Total adjusted education expenses allocated to QTP's	25,602.
5. Total amount of QTP's distributed	25,602.
6. QTP factor (divide line 4 by line 5)	1.0000
7. Nontaxable amount of QTP earnings (line 1 x line 6)	12,219.
8. Taxable amount of QTP earnings (subtract line 7 from line 1)	0.
9. Taxable rollovers	0.
10. Taxable amount of all QTP's (add line 8 and 9)	0.

Tax Bracket Worksheet (Form 1040, 1040-SR, or 1040-NR, Line 16)

Capital Gain Rates (Capital Gain/Sch. D Tax Worksheet)

	Income	Tax
10% ordinary tax bracket (\$0 - \$22,000).....	\$ 22,000.	\$ 2,200.
12% ordinary tax bracket (\$22,001 - \$89,450).....	67,450.	8,094.
22% ordinary tax bracket (\$89,451 - \$190,750).....	101,300.	22,286.
24% ordinary tax bracket (\$190,751 - \$364,200).....	173,450.	41,628.
32% ordinary tax bracket (\$364,201 - \$462,500).....	21,546.	6,895.

Taxable ordinary income

\$ 385,746.

15% capital gain bracket.....

14,915.

2,237.

25% capital gain bracket.....

2.

1.

Total using capital gain rates

\$ 400,663. \$ 83,341.

* Ordinary income would have to increase by over \$76,754
to begin being taxed in the next 35% tax bracket (\$462,501 - \$693,750)

Client WEISS [REDACTED] and Daliah Handel Weiss

Federal Income Tax Withheld

[REDACTED]
 State of Florida
 Additional Medicare Tax Withholding (Form 8959)

50,483.
 21,995.
 120.
 Total 72,598.

Unrecaptured Section 1250 Gain (Schedule D, Line 19)

1. For each section 1250 property in Part III of Form 4797, enter the smaller of line 22 or line 24 See Line 3
2. Enter the amount from Form 4797, line 26g for the property on line 1 See Line 3
3. Total unrecaptured section 1250 gain from Form 4797, Part III or other related forms 0.
4. Enter the total unrecaptured section 1250 gain included on line 26 or line 37 of Form(s) 6252 of trade or business property held more than one year 0.
5. Enter the total of any amounts reported on Schedule K-1 from a partnership or an S corporation as "unrecaptured section 1250 gain" 0.
6. Add lines 3 through 5 0.
7. Enter the smaller of line 6 or the gain from Form 4797, line 7 0.
8. Enter the amount, if any, from Form 4797, line 8 0.
9. Subtract line 8 from line 7. If zero or less, enter zero 0.
10. Enter the amount of any gain from the sale or exchange of an interest in a partnership attributable to unrecaptured section 1250 gain 0.
11. Enter the total of any amounts reported to you on a Schedule K-1, Form 1099-DIV, or Form 2439 as "unrecaptured section 1250 gain" from an estate, trust, real estate investment trust, or mutual fund (or other regulated investment company) 2.
12. Enter the total of any unrecaptured section 1250 gain from sales (including installment sales) or other dispositions of section 1250 property held more than 1 year for which an entry was not made in part I of Form 4797 for the year of sale 0.
13. Add lines 9 through 12 2.
14. If you had any section 1202 gain or collectibles gains or (loss), enter the total of lines 1 through 4 of the 28% Rate Gain Worksheet. 0.
15. Enter the loss, if any, from Schedule D, line 7. If Schedule D, line 7 is zero or a gain, enter zero 0.
16. Enter your long-term capital loss carryovers from Schedule D line 14, and Schedule K-1 (Form 1041) box 11, code D 0.
17. Combine lines 14 through 16. If the result is zero or a gain, enter zero. If the result is a loss, enter it as a positive amount 0.
18. Unrecaptured section 1250 gain. Subtract line 17 from line 13. If zero or less, enter zero. Enter the result here and on Schedule D, line 19 2.

Client WEISS [REDACTED] and Daliah Handel Weiss

Form 1116, Page 1, Line 3d
Gross Foreign Source Income
Category of income - Passive
OTHER COUNTRY

Gross qualifying dividends.....	\$	1,137.
Gross capital gain distributions.....		1,455.
Total	\$	<u>2,592.</u>

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

Wages, salaries, tips, etc.	383,637.
Taxable interest.....	10,291.
Ordinary dividends.....	16,284.
Capital gain and other gains.....	1,455.
Taxable pensions and annuities.....	14,564.
Income from Trust and Estate K-1's.....	1,860.
Other income - Schedule 1, Line 8 before NOL and Foreign Exclusion.....	325.
Total	\$ <u>428,416.</u>

Taxable Income Limitation (Form 1116, Line 18)
(Taxpayers who completed Schedule D)

1. Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 15	400,663.
2. Enter your worldwide 28% gains	0.
3. Multiply line 2 by 0.2432	0.
4. Enter your worldwide 25% gains	2.
5. Multiply line 4 by 0.3243	1.
6. Enter worldwide 20% gains & qualified dividends	0.
7. Multiply line 6 by 0.4595	0.
8. Enter worldwide 15% gains & qualified dividends	14,915.
9. Multiply line 8 by 0.5946	8,868.
10. Enter worldwide 0% gains & qualified dividends	0.
11. Add lines 3, 5, 7, 9 and 10	8,869.
12. Subtract line 11 from line 1. Enter on Form 1116, line 18	<u>391,794.</u>

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

1. Enter the amount from Form 6251, line 4	429,195.
2. Enter your worldwide 28% gains	N/A
3. Multiply line 2 by N/A	N/A
4. Enter your worldwide 25% gains (Form 6251, Line 36)	2.
5. Multiply line 4 by 0.1071	0.
6. Enter worldwide 20% gains & qual. div. (Form 6251, Line 33)	0.
7. Multiply line 6 by 0.2857	0.
8. Enter worldwide 15% gains & qual. div. (Form 6251, Line 30)	14,915.
9. Multiply line 8 by 0.4643	6,925.
10. Enter worldwide 0% gains & qual. div. (Form 6251, Line 23)	0.
11. Add lines 3, 5, 7, 9 and 10	6,925.
12. Subtract line 11 from line 1. Enter on Form 1116, line 18	<u>422,270.</u>

Client WEISS [REDACTED] and Daliah Handel Weiss

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

- | | |
|---|--------------------|
| 1. Enter the total foreign taxes paid/accrued (Form 1116, ln. 9) | 232. |
| 2. less: Reduction in foreign taxes (Form 1116, ln. 12) | <u>0.</u> |
| 3. Subtract ln. 2 from ln. 1. These are your 2023 taxes available for credit. | <u><u>232.</u></u> |

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

- | | |
|--|------|
| 4. Enter the allowable deduction (Form 1116, ln. 24) | 188. |
|--|------|

	<u>Remainder</u>	<u>Deduct this year</u>	<u>Carryover to next year</u>
<u>2023</u>			
5. Enter the smaller of ln. 3 or ln. 4		188.	
6. Subtract ln. 5 from ln. 3			44.
7. Subtract ln. 5 from ln. 4	0.		
** Amount may be subject to carryback			
<u>2013</u>			
8. Enter the carryover from 2013	0.		
9. Enter the smaller of ln. 7 or ln. 8		0.	
10. Subtract ln. 9 from ln. 8			EXPIRED
11. Subtract ln. 9 from ln. 7	0.		
<u>2014</u>			
12. Enter the carryover from 2014	0.		
13. Enter the smaller of ln. 11 or ln. 12		0.	
14. Subtract ln. 13 from ln. 12			0.
15. Subtract ln. 13 from ln. 11	0.		
<u>2015</u>			
16. Enter the carryover from 2015	0.		
17. Enter the smaller of ln. 15 or ln. 16		0.	
18. Subtract ln. 17 from ln. 16			0.
19. Subtract ln. 17 from ln. 15	0.		
<u>2016</u>			
20. Enter the carryover from 2016	120,244.		
21. Enter the smaller of ln. 19 or ln. 20		0.	
22. Subtract ln. 21 from ln. 20			120,244.
23. Subtract ln. 21 from ln. 19	0.		
<u>2017</u>			
24. Enter the carryover from 2017	0.		
25. Enter the smaller of ln. 23 or ln. 24		0.	
26. Subtract ln. 25 from ln. 24			0.
27. Subtract ln. 25 from ln. 23	0.		
<u>2018</u>			
28. Enter the carryover from 2018	0.		
29. Enter the smaller of ln. 27 or ln. 28		0.	
30. Subtract ln. 29 from ln. 28			0.
31. Subtract ln. 29 from ln. 27	0.		
<u>2019</u>			
32. Enter the carryover from 2019	0.		
33. Enter the smaller of ln. 31 or ln. 32		0.	
34. Subtract ln. 33 from ln. 32			0.
35. Subtract ln. 33 from ln. 31	0.		
<u>2020</u>			

Client WEISS [REDACTED] and Daliah Handel Weiss

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

36. Enter the carryover from 2020	0.		
37. Enter the smaller of ln. 35 or ln. 36		0.	
38. Subtract ln. 37 from ln. 36			0.
39. Subtract ln. 37 from ln. 35	0.		
<u>2021</u>			
40. Enter the carryover from 2021	0.		
41. Enter the smaller of ln. 39 or ln. 40		0.	
42. Subtract ln. 41 from ln. 40			0.
43. Subtract ln. 41 from ln. 39	0.		
<u>2022</u>			
44. Enter the carryover from 2022	0.		
45. Enter the smaller of ln. 43 or ln. 44		0.	
46. Subtract ln. 45 from ln. 44			0.

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

1. Enter the total foreign taxes paid/accrued (Form 1116, ln. 9)	232.
2. less: Reduction in foreign taxes (Form 1116, ln. 12)	0.
3. Subtract ln. 2 from ln. 1. These are your 2023 taxes available for credit.	<u>232.</u>

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

4. Enter the allowable deduction (Form 1116, ln. 24)	258.
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	<u>Remainder</u>	<u>Deduct this year</u>	<u>Carryover to next year</u>
<u>2023</u>			
5. Enter the smaller of ln. 3 or ln. 4		232.	
6. Subtract ln. 5 from ln. 3			0.
7. Subtract ln. 5 from ln. 4	26.		
** Amount may be subject to carryback			
<u>2013</u>			
8. Enter the carryover from 2013	0.		
9. Enter the smaller of ln. 7 or ln. 8		0.	
10. Subtract ln. 9 from ln. 8			EXPIRED
11. Subtract ln. 9 from ln. 7	26.		
<u>2014</u>			
12. Enter the carryover from 2014	0.		
13. Enter the smaller of ln. 11 or ln. 12		0.	
14. Subtract ln. 13 from ln. 12			0.
15. Subtract ln. 13 from ln. 11	26.		
<u>2015</u>			
16. Enter the carryover from 2015	0.		
17. Enter the smaller of ln. 15 or ln. 16		0.	
18. Subtract ln. 17 from ln. 16			0.
19. Subtract ln. 17 from ln. 15	26.		
<u>2016</u>			
20. Enter the carryover from 2016	121,470.		
21. Enter the smaller of ln. 19 or ln. 20		26.	
22. Subtract ln. 21 from ln. 20			121,444.

Client WEISS [REDACTED] and Daliah Handel Weiss

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

23. Subtract ln. 21 from ln. 19	0.		
<u>2017</u>			
24. Enter the carryover from 2017	0.		
25. Enter the smaller of ln. 23 or ln. 24		0.	
26. Subtract ln. 25 from ln. 24			0.
27. Subtract ln. 25 from ln. 23	0.		
<u>2018</u>			
28. Enter the carryover from 2018	0.		
29. Enter the smaller of ln. 27 or ln. 28		0.	
30. Subtract ln. 29 from ln. 28			0.
31. Subtract ln. 29 from ln. 27	0.		
<u>2019</u>			
32. Enter the carryover from 2019	0.		
33. Enter the smaller of ln. 31 or ln. 32		0.	
34. Subtract ln. 33 from ln. 32			0.
35. Subtract ln. 33 from ln. 31	0.		
<u>2020</u>			
36. Enter the carryover from 2020	0.		
37. Enter the smaller of ln. 35 or ln. 36		0.	
38. Subtract ln. 37 from ln. 36			0.
39. Subtract ln. 37 from ln. 35	0.		
<u>2021</u>			
40. Enter the carryover from 2021	0.		
41. Enter the smaller of ln. 39 or ln. 40		0.	
42. Subtract ln. 41 from ln. 40			0.
43. Subtract ln. 41 from ln. 39	0.		
<u>2022</u>			
44. Enter the carryover from 2022	0.		
45. Enter the smaller of ln. 43 or ln. 44		0.	
46. Subtract ln. 45 from ln. 44			0.

Foreign Tax Credit Carryover Summary
(Form 1116 - Foreign Tax Credit Carryovers to 2024)
Passive Income

	Foreign Taxes Paid	Foreign Taxes Disallowed	Foreign Taxes Claimed	Foreign Tax Credit Carryover
Carryover from 2023 **	232.	0.	188.	44.
Carryover from 2022	197.	0.	197.	0.
Carryover from 2021	177.	0.	177.	0.
Carryover from 2020	178.	0.	178.	0.
Carryover from 2019	190.	0.	190.	0.
Carryover from 2018	186.	0.	186.	0.
Carryover from 2017	187.	0.	187.	0.
Carryover from 2016	123,116.	0.	2,872.	120,244.
Carryover from 2015	0.	0.	0.	0.
Carryover from 2014	0.	0.	0.	0.

**Amount may be subject to carryback

Client WEISS [REDACTED] and Daliah Handel Weiss

Foreign Tax Credit Carryover Summary (continued)
(Form 1116 - Foreign Tax Credit Carryovers to 2024)
Passive Income - AMT

	Foreign Taxes Paid	Foreign Taxes Disallowed	Foreign Taxes Claimed	Foreign Tax Credit Carryover
Carryover from 2023 **	232.	0.	232.	0.
Carryover from 2022	197.	0.	197.	0.
Carryover from 2021	177.	0.	177.	0.
Carryover from 2020	178.	0.	178.	0.
Carryover from 2019	190.	0.	190.	0.
Carryover from 2018	186.	0.	186.	0.
Carryover from 2017	187.	0.	187.	0.
Carryover from 2016	123,116.	0.	1,672.	121,444.
Carryover from 2015	0.	0.	0.	0.
Carryover from 2014	0.	0.	0.	0.

**Amount may be subject to carryback

Form 8960, Line 4b
Adjustment For Non-Section 1411 Business

Income (Loss) Line 4a	Non-Sec. 1411 Adjustment Line 4b
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Schedule E, Page 2, K-1

Estate/Trust #1; [REDACTED] Rvic Tr Dated 4-19-2000

Net Income (Loss)	\$ 1,860.	
K-1 Subtotal	\$ 1,860.	\$ 0.
Total	\$ 1,860.	\$ 0.

Form 8960, Line 7
Other Modifications to Investment Income

Schedule K-1, Form 1041, Box 14H	\$ -1,351.
Total	\$ -1,351.

Form 8960, Line 13
Modified Adjusted Gross Income Worksheet

1. Enter your Adjusted Gross Income	\$ 428,416.
2a. Foreign Earned Income Exclusion (Form 2555, line 42)	0.
2b. Deductions reported on Form 2555, line 44 allocable to your Foreign Earned Income Exclusion	0.
3. Adjustments for certain CFCs and certain PFICs	0.
3a. Adjustment from Form 1041, K-1, Code H (if positive amount)	0.
4. Sum of lines 1, 2a, 2b, 3, and 3a	\$ 428,416.

2023**2023 Schedule D Tax Worksheet****Client WEISS [REDACTED] and Daliah Handel Weiss**

Complete this worksheet only if line 18 or line 19 of Schedule D is more than zero and lines 15 and 16 of Schedule D are gains or if you file Form 4952 and you have an amount on line 4g, even if you don't need to file Schedule D. Otherwise, complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16, (or in the instructions for Form 1040-NR, line 16) to figure your tax. Before completing this worksheet, complete Form 1040, 1040-SR, or 1040-NR through line 15.

Exception: Don't use the Qualified Dividends and Capital Gain Tax Worksheet or this worksheet to figure your tax if:

- Line 15 or line 16 of Schedule D is zero or less and you have no qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a;

or

- Form 1040, 1040-SR, or 1040-NR, line 15, is zero or less.

Instead, see the instructions for Form 1040, line 16 (or Form 1040-NR, line 16).

1. Enter your taxable income from Form 1040, 1040-SR, or 1040-NR, line 15. (However, if you are filing Form 2555 (relating to foreign earned income), enter instead the amount from line 3 of the Foreign Earned Income Tax Worksheet in the instructions for Form 1040, line 16.) **1.** 400,663.
 2. Enter your qualified dividends from Form 1040, 1040-SR, or 1040-NR, line 3a **2.** 13,462.
 3. Enter the amount from Form 4952 (used to figure investment interest expense deduction), line 4g **3.** _____
 4. Enter the amount from Form 4952, line 4e* **4.** _____
 5. Subtract line 4 from line 3. If zero or less, enter -0- ... **5.** 0.
 6. Subtract line 5 from line 2. If zero or less, enter -0-** **6.** 13,462.
 7. Enter the **smaller** of line 15 or line 16 of Schedule D ... **7.** 1,455.
 8. Enter the **smaller** of line 3 or line 4 **8.** 0.
 9. Subtract line 8 from line 7. If zero or less, enter -0-** **9.** 1,455.
 10. Add lines 6 and 9 **10.** 14,917.
 11. Add lines 18 and 19 of Schedule D** **11.** 2.
 12. Enter the **smaller** of line 9 or line 11 **12.** 2.
 13. Subtract line 12 from line 10 **13.** 14,915.
 14. Subtract line 13 from line 1. If zero or less, enter -0- **14.** 385,748.
 15. Enter:
 - \$44,625 if single or married filing separately;
 - \$89,250 if married filing jointly or qualifying surviving spouse; or
 - \$59,750 if head of household.
 **15.** 89,250.
 16. Enter the **smaller** of line 1 or line 15 **16.** 89,250.
 17. Enter the **smaller** of line 14 or line 16 **17.** 89,250.
 18. Subtract line 17 from line 14. If zero or less, enter -0- ... **18.** 385,746.
 19. Enter the **smaller** of line 1 or:
 - \$182,100 if single or married filing separately;
 - \$364,200 if married filing jointly or qualifying surviving spouse; or
 - \$182,100 if head of household.
 **19.** 364,200.
 20. Enter the **smaller** of line 14 or line 19 **20.** 364,200.
 21. Enter the **larger** of line 18 or line 20 **21.** 385,746.
 22. Subtract line 17 from line 16. This amount is taxed at 0% **22.** 0.
- If lines 1 and 16 are the same, skip lines 23 through 43 and go to line 44. Otherwise, go to line 23.**
23. Enter the **smaller** of line 1 or line 13 **23.** 14,915.
 24. Enter the amount from line 22. (If line 22 is blank, enter -0-.) ... **24.** 0.
 25. Subtract line 24 from line 23. If zero or less, enter -0- **25.** 14,915.
 26. Enter:
 - \$492,300 if single;
 - \$278,900 if married filing separately;
 - \$533,850 if married filing jointly or qualifying surviving spouse; or
 - \$523,050 if head of household.
 **26.** 553,850.
 27. Enter the **smaller** of line 1 or line 26 **27.** 400,663.
 28. Add lines 21 and 22 **28.** 385,746.
 29. Subtract line 28 from line 27. If zero or less, enter -0- **29.** 14,917.
 30. Enter the **smaller** of line 25 or line 29 **30.** 14,915.

2023

2023 Schedule D Tax Worksheet - Continued

Client WEISS

and Daliah Handel Weiss

31. Multiply line 30 by 15% (0.15).	31.	2,237.
32. Add lines 24 and 30.	32.	14,915.
If lines 1 and 32 are the same, skip lines 33 through 43 and go to line 44. Otherwise, go to line 33.		
33. Subtract line 32 from line 23.	33.	0.
34. Multiply line 33 by 20% (0.20).	34.	0.
If Schedule D, line 19, is zero or blank, skip lines 35 through 40 and go to line 41. Otherwise, go to line 35.		
35. Enter the smaller of line 9 above or Schedule D, line 19.	35.	2.
36. Add lines 10 and 21.	36.	400,663.
37. Enter the amount from line 1 above.	37.	400,663.
38. Subtract line 37 from line 36. If zero or less, enter -0-	38.	0.
39. Subtract line 38 from line 35. If zero or less, enter -0-	39.	2.
40. Multiply line 39 by 25% (0.25).	40.	1.
If Schedule D, line 18, is zero or blank, skip lines 41 through 43 and go to line 44. Otherwise, go to line 41.		
41. Add lines 21, 22, 30, 33, and 39.	41.	
42. Subtract line 41 from line 1.	42.	
43. Multiply line 42 by 28% (0.28).	43.	
44. Figure the tax on the amount on line 21. If the amount on line 21 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 21 is \$100,000 or more, use the Tax Computation Worksheet.	44.	81,103.
45. Add lines 31, 34, 40, 43, and 44.	45.	83,341.
46. 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.	46.	85,876.
47. Tax on all taxable income (including capital gains and qualified dividends). Enter the smaller of line 45 or line 46. Also, include this amount on Form 1040, 1040-SR, or 1040-NR, line 16. (If you are filing Form 2555, don't enter this amount on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet in the Instructions for Form 1040.)	47.	83,341.

* If applicable, enter instead the smaller amount you entered on the dotted line next to line 4e of Form 4952.

** If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet in the instructions for Form 1040, line 16, before completing this line.

DO NOT MAIL --- WORKSHEET COPY ONLY

Form **2210****Underpayment of Estimated Tax by
Individuals, Estates, and Trusts**

OMB No. 1545-0140

2023Department of the Treasury
Internal Revenue ServiceAttach to Form 1040, 1040-SR, 1040-NR, or 1041.
Go to www.irs.gov/Form2210 for instructions and the latest information.Attachment
Sequence No. **06**

Name(s) shown on tax return

Identifying number

[REDACTED] and Daliah Handel Weiss

[REDACTED]

Do You Have To File Form 2210?

Complete lines 1 through 7 below. Is line 4 or line 7 less than \$1,000?

Yes

Don't file Form 2210. You don't owe a penalty.

No

Complete lines 8 and 9 below. Is line 6 equal to or more than line 9?

Yes

You **don't** owe a penalty. **Don't** file Form 2210 unless **box E** in Part II applies, then file page 1 of Form 2210.

No

You may owe a penalty. Does any box in Part II below apply?

Yes

You **must** file Form 2210. Does box **B, C, or D** in Part II apply?

No

No

Yes

You must figure your penalty.

Don't file Form 2210. You aren't required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III as a worksheet and enter your penalty amount on your tax return, but **don't file Form 2210.**You **aren't** required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III as a worksheet and enter your penalty amount on your tax return, but **file only page 1 of Form 2210.****Part I Required Annual Payment**

1	Enter your 2023 tax after credits from Form 1040, 1040-SR, or 1040-NR, line 22. (See the instructions if not filing Form 1040.)	1	83,153.
2	Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	2,945.
3	Other payments and refundable credits (see instructions)	3	0.
4	Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop ; you don't owe a penalty. Don't file Form 2210	4	86,098.
5	Multiply line 4 by 90% (0.90)	5	77,488.
6	Withholding taxes. Don't include estimated tax payments. See instructions	6	72,598.
7	Subtract line 6 from line 4. If less than \$1,000, stop ; you don't owe a penalty. Don't file Form 2210.	7	13,500.
8	Maximum required annual payment based on prior year's tax (see instructions)	8	77,113.
9	Required annual payment. Enter the smaller of line 5 or line 8.	9	77,113.

Next: Is line 9 more than line 6?

☐ **No.** You **don't** owe a penalty. **Don't** file Form 2210 unless box **E** below applies.☒ **Yes.** You may owe a penalty, but **don't** file Form 2210 unless one or more boxes in Part II below applies.• If box **B, C, or D** applies, you must figure your penalty and file Form 2210.• If box **A or E** applies (but not **B, C, or D**), file only page 1 of Form 2210. You **aren't** required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III as a worksheet and enter your penalty on your tax return, but **file only page 1 of Form 2210.****Part II Reasons for Filing.** Check applicable boxes. If none apply, **don't** file Form 2210.

- A** ☐ You request a **waiver** (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you aren't required to figure your penalty.
- B** ☐ You request a **waiver** (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C** ☐ Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D** ☐ Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E** ☐ You filed or are filing a joint return for either 2022 or 2023, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you **aren't** required to figure your penalty (unless box **B, C, or D** applies).

BAA For Paperwork Reduction Act Notice, see separate instructions.

Form 2210 (2023)

Part III **Penalty Computation** (See the instructions if you're filing Form 1040-NR.)

Section A – Figure Your Underpayment		Payment Due Dates				
		(a) 4/15/23	(b) 6/15/23	(c) 9/15/23	(d) 1/15/24	
10	Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 27. Otherwise, enter 25% (0.25) of line 9, Form 2210, in each column. For fiscal year filers, see instructions	10	19,278.	19,278.	19,278.	19,279.
11	Estimated tax paid and tax withheld (see the instructions). For column (a) only, also enter the amount from line 11 on line 15, column (a). If line 11 is equal to or more than line 10 for all payment periods, stop here; you don't owe a penalty. Don't file Form 2210 unless you checked a box in Part II.	11	18,150.	18,150.	18,149.	31,149.

Complete lines 12 through 18 of one column before going to line 12 of the next column.

12	Enter the amount, if any, from line 18 in the previous column.	12				
13	Add lines 11 and 12	13		18,150.	18,149.	31,149.
14	Add the amounts on lines 16 and 17 in the previous column.	14		1,128.	2,256.	3,385.
15	Subtract line 14 from line 13. If zero or less, enter -0-. For column (a) only, enter the amount from line 11 . . .	15	18,150.	17,022.	15,893.	27,764.
16	If line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-.	16		0.	0.	
17	Underpayment. If line 10 is equal to or more than line 15, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18. . .	17	1,128.	2,256.	3,385.	
18	Overpayment. If line 15 is more than line 10, subtract line 10 from line 15. Then go to line 12 of the next column.	18				

Section B – Figure the Penalty (Use the Worksheet for Form 2210, Part III, Section B – Figure the Penalty in the instructions.)

19	Penalty. Enter the total penalty from line 14 of the Worksheet for Form 2210, Part III, Section B – Figure the Penalty. Include this amount on Form 1040, 1040-SR, or 1040-NR, line 38; or Form 1041, line 27. Don't file Form 2210 unless you checked a box in Part II.	19	129.
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Form **2210** (2023)

2023

Underpayment Penalty Worksheet

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

Required Installment	Payment			Penalty				
	Date	Type *	Amount	Underpayment	Days Late	Rate	Amount of Penalty **	Penalty per Period
First Qtr 19,278.	4/15/23	2	18,150.	1,128.	61	0.070	13.20	
	6/15/23	2	1,128.					
Total								13.20
Second Qtr 19,278.	6/15/23	2	17,022.	2,256.	92	0.070	39.80	
	9/15/23	2	2,256.					
Total								39.80
Third Qtr 19,278.	9/15/23	2	15,893.	3,385.	15	0.070	9.74	
Total								9.74
Rate Change	9/30/23			3,385.	89	0.080	66.03	
	12/28/23	3	3,385.					
Total								66.03
Fourth Qtr 19,279.	12/28/23	3	9,615.	9,664.				
	1/15/24	2	9,664.					

TOTAL UNDERPAYMENT PENALTY.....

129.

* 1 = Overpayment

2 = Withholding

3 = Estimate

4 = Extension

5 = Paid with return

**

Underpayment x $\frac{\text{Days Late}}{365}$ x Rate

Client WEISS [REDACTED] and Daliah Handel Weiss

Rvic Tr Dated 4-19-2000

Fiduciary Passive	K-1 Input	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Unallowed Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E (page 2)			Qualified	Dividends	4,583	
Ordinary income (loss)	1,860.					
Rental real estate income (loss)						
Other rental income (loss)						
Section 59(e)(2) expenses						
Passive interest expense						
Guaranteed payments (nonpassive)						
Section 179 expense and carryover						
Disallowed section 179 expense						
Net income (loss)	1,860.					1,860.
First passive other						
Second passive other						
Cost depletion						
Percentage depletion						
Depletion carryover						
Disallowed due to 65% limitation						
Unreimbursed expenses (nonpassive)						
Nonpassive other						
Total Schedule E (page 2)						1,860.
FORM 4797						
Section 1231 gain (loss)						
4797 ordinary income						
SCHEDULE D						
Short-term capital gain (loss)						
Long-term capital gain (loss)						
FORM 4952						
Investment interest expense						
Other net investment income						
SCHEDULE A						
Charitable contributions						
Deductions related to portfolio income						
SCHEDULE B						
Interest income (banks, S&L, C/U, etc.)	9,516.					9,516.
Interest income (U.S. bonds, T-bills, etc.)						
Ordinary dividends	5,392.					5,392.
Tax-exempt interest (total muni-bonds)	17,311.					17,311.
Tax-exempt interest (in-state bonds)						
FORM 6251						
Depreciation adjustment after 12/31/86						
Adjusted gain or loss						
Depreciation (pre-1987)						
Beneficiary's AMT adjustment	832.					832.
Depletion						
Excess intangible drilling costs						
MISCELLANEOUS						
Net earnings from self employment (SE)						
Gross farming income (Sch. E, page 2)						
Royalties (Sch. E, page 1)						
Taxes on undistributed capital gains (1040)						
Credit for income tax withheld						
Estimated taxes credited from trust						
Credits						

*Carries to AMT at-risk/passive worksheets to compute Form 6251.

2023

Client WEISS

2024 Federal Estimated Tax Worksheet

Page 1

2024 Estimated Tax Worksheet

and Daliah Handel Weiss

Keep for Your Records

1	Adjusted gross income you expect in 2024 (see instructions)	1	428,416.
2a	Deductions. • If you plan to itemize deductions, enter the estimated total of your itemized deductions. • If you don't plan to itemize deductions, enter your standard deduction.	2a	29,200.
b	If you can take the qualified business income deduction, enter the estimated amount of the deduction	2b	53.
c	Add lines 2a and 2b	2c	29,253.
3	Subtract line 2c from line 1.	3	399,163.
4	Tax. Figure your tax on the amount on line 3 by using the 2024 Tax Rate Schedules . Caution: If you will have qualified dividends or a net capital gain, or expect to exclude or deduct foreign earned income or housing, see Worksheets 2-5 and 2-6 in Pub. 505 to figure the tax	4	80,570.
5	Alternative minimum tax from Form 6251	5	
6	Add lines 4 and 5. Add to this amount any other taxes you expect to include in the total on Form 1040 or 1040-SR, line 16	6	80,570.
7	Credits (see instructions). Do not include any income tax withholding on this line	7	188.
8	Subtract line 7 from line 6. If zero or less, enter -0-	8	80,382.
9	Self-employment tax (see instructions)	9	
10	Other taxes (see instructions)	10	2,945.
11a	Add lines 8 through 10	11a	83,327.
b	Earned income credit, additional child tax credit, fuel tax credit, net premium tax credit, refundable American opportunity credit, and section 1341 credit	11b	
c	Total 2024 estimated tax. Subtract line 11b from line 11a. If zero or less, enter -0-	11c	83,327.
12a	Multiply line 11c by 90% (66-2/3% for farmers and fishermen)	12a	74,994.
b	Required annual payment based on prior year's tax (see instructions)	12b	94,708.
c	Required annual payment to avoid a penalty. Enter the smaller of line 12a or 12b	12c	94,708.
	Caution: Generally, if you do not prepay (through income tax withholding and estimated tax payments) at least the amount on line 12c, you may owe a penalty for not paying enough estimated tax. To avoid a penalty, make sure your estimate on line 11c is as accurate as possible. Even if you pay the required annual payment, you may still owe tax when you file your return. If you prefer, you can pay the amount shown on line 11c. For details, see chapter 2 of Pub. 505.		
13	Income tax withheld and estimated to be withheld during 2024 (including income tax withholding on pensions, annuities, certain deferred income, and Additional Medicare Tax withholding)	13	72,598.
14a	Subtract line 13 from line 12c	14a	22,110.
	Is the result zero or less? ☐ Yes. Stop here. You are not required to make estimated tax payments. ☒ No. Go to line 14b.		
b	Subtract line 13 from line 11c	14b	10,729.
	Is the result less than \$1,000? ☐ Yes. Stop here. You are not required to make estimated tax payments. ☒ No. Go to line 15 to figure your required payment.		
15	Rounded balance	15	22,120.
16	Overpayment of estimated tax applied to next tax year	16	
17	Total of estimated tax payments to be mailed with vouchers	17	22,120.
18	If the first payment you are required to make is due April 15, 2024, enter 1/4 of line 14a (minus any 2023 overpayment that you are applying to this installment) here, and on your estimated tax payment voucher(s) if you are paying by check or money order	18	5,530.

01/03/24

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

2024 Estimated Tax Worksheet - Adjusted Gross Income

<u>Income</u>	<u>This Year</u>	<u>Difference</u>	<u>Next Year</u>
Wages	383,637.	0.	383,637.
Interest	10,291.	0.	10,291.
Ordinary dividends	16,284.	0.	16,284.
Long-term capital gain (loss)	1,455.	0.	1,455.
Taxable pensions	14,564.	0.	14,564.
Rents, royalties, etc.	1,860.	0.	1,860.
Other income	325.	0.	325.
Total income	428,416.	0.	428,416.

<u>Additional Capital Gain Information</u>	<u>This Year</u>	<u>Difference</u>	<u>Next Year</u>
Qualified dividends	13,462.	0.	13,462.
Unrecaptured section 1250 capital gain	2.	0.	2.

Estimated adjusted gross income 428,416.

Client WEISS

and Daliah Handel Weiss

2024 Estimated Tax Maximum Capital Gains Rate Tax Computation
 (line numbers are from Schedule D Tax Worksheet)

1. Enter your taxable income for next year		399,163.
2. Enter your qualified dividends for next year	13,462.	
3. Form 4952, line 4g amount	0.	
4. Form 4952, line 4e amount	1,455.	
5. Subtract line 4 from line 3 (not less than zero)	0.	
6. Subtract line 5 from line 2 (not less than zero)	13,462.	
7. Enter the smaller of line 15 or line 16 of Sch D	1,455.	
8. Enter the smaller of line 3 or line 4	0.	
9. Subtract line 8 from line 7 (not less than zero)	1,455.	
10. Add lines 6 and 9	14,917.	
11. Add lines 18 and 19 of Sch D	2.	
12. Enter the smaller of line 9 or line 11	2.	
13. Subtract line 12 from line 10		14,915.
14. Subtract line 13 from line 1 (not less than zero)		384,248.
15. Enter the tax bracket limit	94,050.	
16. Enter the smaller of line 1 or line 15	94,050.	
17. Enter the smaller of line 14 or line 16	94,050.	
18. Subtract line 10 from line 1 (not less than zero)	384,246.	
19. Enter the smaller of line 1 or threshold	383,900.	
20. Enter the smaller of line 14 or line 19	383,900.	
21. Enter the larger of line 18 or line 20	384,246.	
22. Subtract line 17 from line 16. This is taxed at 0%	0.	
23. Enter the smaller of line 1 or line 13	14,915.	
24. Enter the amount from line 22	0.	
25. Subtract line 24 from line 23 (not less than zero)	14,915.	
26. Enter the high income threshold	583,750.	
27. Enter the smaller of line 1 or line 26	399,163.	
28. Add lines 21 and 22	384,246.	
29. Subtract lines 28 from line 27 (not less than zero)	14,917.	
30. Enter the smaller of line 25 or line 29	14,915.	
31. Multiply line 30 by 15% (.15)		2,237.
32. Add lines 24 and 30	14,915.	
33. Subtract line 32 from line 23	0.	
34. Multiply line 33 by 20% (.20)		0.
35. Enter the smaller of line 9 above or Sch D line 19	2.	
36. Add lines 10 and 21	399,163.	
37. Enter the amount from line 1 above	399,163.	
38. Subtract line 37 from line 36 (not less than zero)	0.	
39. Subtract line 38 from line 35 (not less than zero)	2.	
40. Multiply line 39 by 25% (.25)		1.
44. Figure the tax on the amount on line 21		78,332.
45. Add lines 31, 34, 40, 43, and 44		80,570.
46. Figure the tax on the amount on line 1		83,105.
47. Tax (enter the smaller of line 45 or line 46)		<u>80,570.</u>

Client WEISS [REDACTED] and Daliah Handel Weiss

2024 Estimated Tax Worksheet - Alternative Minimum TaxAlternative Minimum Taxable Income

1. Enter amount from 1040ES Worksheet line 3 (if not itemizing, enter ES worksheet line 1 and go to line 3 below)	428,363.
3. Tax refund	0.
4. Dispositions, small bus. stock, and incentive stock options adj.	0.
5. Other adjustments	832.
6. Alternative minimum taxable income	<u>429,195.</u>

Alternative Minimum Tax

7. Exemption	133,300.
8. Subtract line 7 from line 6	295,895.
9. Tax	76,260.
10. Alternative minimum tax foreign tax credit	258.
11. Tentative minimum tax	76,002.
12. Tax from ES Worksheet	80,382.
13. Alternative minimum tax (line 11 minus line 12)	<u>0.</u>

Tax Computation Using Maximum Capital Gain Rates

14. Alternative minimum taxable income less exemption	295,895.
15. AMT long-term cap. gain, section 1250, and qualified dividends	14,917.
16. Income subject to 26%/28% AMT rates (line 14 minus line 15)	280,978.
17. Tax on 26% rate income (28% and subtract \$4652 if high income)	74,022.
18. Capital gain income subject to 0% rate	0.
19. Tax on 0% capital gain income	0.
20. Capital gain income subject to 15% rate	14,915.
21. Tax on 15% capital gain income	2,237.
22. Capital gain income subject to 20% rate	0.
23. Tax on 20% capital gain income	0.
24. Capital gain income subject to 25% rate	2.
25. Tax on 25% capital gain income	1.
26. Add lines 17, 19, 21, 23, and 25	76,260.
27. Multiply line 14 by 26% (28% and subtract \$4652 if high income)	<u>78,199.</u>
28. Total Tax (smaller of line 26 or line 27)	<u>76,260.</u>

2024 Estimated Tax Worksheet - Nonrefundable Credits

Foreign tax credit.....	\$ 188.
Total	<u>\$ 188.</u>

Client WEISS and Daliah Handel Weiss

2024 Estimated Tax - Other Taxes WorksheetAdditional Medicare Tax on Wages and SE Income

1. Wages & tips subject to medicare tax	395,235.
2. Threshold for filing status	250,000.
3. Wages and tips subject to additional medicare tax (subtract line 2 from line 1)	145,235.
4. Additional medicare tax on wages (line 3 x .9%)	1,307.
5. SE medicare income	0.
6. Threshold for filing status	250,000.
7. Amount from line 1	395,235.
8. Remaining threshold (subtract line 7 from line 6)	0.
9. SE income subject to additional medicare tax (subtract line 8 from line 5)	0.
10. Additional medicare tax on SE income (line 9 x .9%)	0.
11. Additional medicare tax on RRTA compensation	0.
12. Total additional medicare tax (add lines 4, 10, and 11)	1,307.

Net Investment Income Tax

1. Interest	10,291.
2. Dividends	16,284.
3. Annuities from nonqualified plans	14,564.
4a. Rents, royalties, K-1, Sch C	1,860.
4b. Rents, royalties, K-1, Sch C not subject to NIIT	0.
4c. Rents, royalties, K-1, Sch C subject to NIIT	1,860.
5a. Net gain (loss) from dispositions	1,455.
5b. Net gain (loss) from dispositions not subj. to NIIT	0.
5c. Adjustment from disposition of pass-through	0.
5d. Net disposition gain (loss) subject to NIIT	1,455.
6. Adjustment for certain CFCs and PFICs	0.
7. Other modifications to investment income	-1,351.
8. Total investment income	43,103.
9. Total deductions and modifications	0.
10. Net investment income	43,103.
11. Modified adjusted gross income	428,416.
12. Threshold for filing status	250,000.
13. MAGI in excess of threshold	178,416.
14. Lesser of MAGI over excess or net investment income	43,103.
15. Net investment income tax (3.8% rate)	1,638.

Other Taxes

Additional medicare tax on wages	1,307.
Net investment income tax	1,638.
Total \$	<u>2,945.</u>