

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/21/2024

General Information

Name: Ms Anne Marie Gannon

PID 43979

AGENCY INFORMATION

Organization	Suborganization	Title
Palm Beach County	Elected Constitutional Officer	Tax Collector

CANDIDATE FOR

Position	Agency Name	Position sought or held
Tax Collector	Palm Beach County Tax Collector	Tax Collector

Net Worth

My Net Worth as of December 31, 2023 was \$ 2,013,490.48.

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 \$ 150,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
N/A	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

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

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

Income

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. 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
Palm Beach Tax Collector	301 N. Olive Avenue, WPB, FL 33401	\$ 204,962.00
Dole Fresh fruit	Box 859, Pittsburg, PA 15230	\$ 5,954.92
Pension Benefit Corporation	Box 15239, Alexandra, WA 22315	\$ 1,015.92
SSA	1 Jamica Place, New York, NY 11432	\$ 45,624.00
1099 IRA	Raymond James, Jupiter, FL	\$ 2,068.56
Capital One Interest	1680 Capital One Dr., McClean, VA 22101	\$ 3,763.77
FRS Investment Plan - Voya 401A	P. O. Box 909000067, Hartford, CT 06199	\$ 5,717.42
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

This section applies only to a Constitutional or elected municipal officer, each of whom are required to complete annual ethics training pursuant to Section 112.3142, F.S.

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

Signature of Reporting Official or Candidate

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

Anne Marie Gannon

Digitally signed: 05/21/2024

Filed with COE: 05/21/2024

1040

Federal Return Summary

2023

Name

Taxpayer Identification Number

Anne Gannon

Tax Form 1040

Filing Status SGL

Tax Method Used Qual Div Cap Gain Wrk

Dependents

Income

Salaries & wages	169,005
Taxable interest income	3,809
Tax exempt interest	
Dividend income	3,261
Qualified dividends	1,672
Taxable state/local refunds	
Alimony received	
Business income/-loss	
Capital gain/-loss	-3,000
Other gain/-loss (Form 4797)	
Taxable IRA distributions	2,069
Taxable pension distributions	12,862
Rental, royalty, partnership, etc. income/-loss	-11
Farm income/-loss	
Unemployment compensation	
Taxable social security benefits	39,454
Other income	
Total income	227,449

Adjustments

Moving expenses	
Deductible part of self-employment tax	
SEP, SIMPLE, and qualified plan deduction	
Self-employed health insurance deduction	
Alimony paid	
IRA deduction	
Student loan interest deduction	
Other adjustments	
Total adjustments	
Adjusted gross income	227,449

Deductions

Medical and Dental expenses	
Taxes paid	
Interest paid	
Charitable contributions	
Other itemized deductions	
Total itemized deductions	
or, Standard deduction	15,700
Taxable income before Qual Bus Inc Ded (QBID)	211,749
QBID	27
Taxable income	211,722

Tax Computation

Regular tax	46,299
Alternative minimum tax	
Excess advance premium tax credit	
Total tax before credits	46,299
Child and dependent care credit	
Education credits	
Other credits	10
Total credits	10
Tax after credits	46,289
Self-employment tax	
Additional tax on IRAs, etc.	
Other taxes	199
Total tax	46,488

Payments

Federal income tax withheld	55,130
Estimated payments	2,074
Other payments/credits	
Total payments	57,204

Refund/Amount Due

Amount overpaid	10,716
Overpayment applied	
Form 2210 penalty	
Amount due/-refund	-10,716
Failure to file penalty	
Failure to pay penalty	
Late filing interest	
Net amount due/-refund	-10,716

2024 Estimates

1st quarter	
2nd quarter	
3rd quarter	
4th quarter	
Total Estimates	

Tax Rates

Marginal tax rate - Ordinary income*	32.0 %
Marginal tax rate - Capital income*	15.0 %
Effective tax rate	22.0 %

* Marginal Tax Rate displayed may not reflect the true tax rate for Schedule J or Form 8615.

Taxpayer Name Anne Gannon
 Spouse Name _____

DO NOT SUBMIT THIS DOCUMENT TO IRS UNLESS REQUESTED TO DO SO

ERO Declaration

I declare that the information contained in this electronic tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the taxpayer. If the furnished return was signed by a paid preparer, I declare I have entered the paid preparer's identifying information in the appropriate portion of this electronic return. If I am the paid preparer, under the penalties of perjury I declare that I have examined this electronic return, and to the best of my knowledge and belief, it is true, correct, and complete. This declaration is based on all information of which I have any knowledge.

ERO Signature

I am signing this Tax Return by entering my PIN below.

ERO's PIN

Taxpayer Declarations

Perjury Statement

Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

Consent to Disclosure

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return to IRS and to receive the following information from IRS: a) an acknowledgment of receipt or reason for rejection of transmission; b) the reason for any delay in processing or refund; and, c) the date of any refund.

Electronic Funds Withdrawal Consent

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. I further understand that this authorization may apply to future Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). I authorize EFTPS to issue me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To request that my PIN be mailed to me, or 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 my electronic income tax return and, if applicable, my Electronic Funds Withdrawal consent.

I am signing this Tax Return/Form and Electronic Funds Withdrawal Consent, if applicable, by entering my Self-Select PIN below.

Date (all numerics) 04/15/24

PIN (enter five numbers, other than all zeroes)

Prior Year Adjusted Gross Income

Date of Birth

Prior Year PIN

Current Year IP PIN

Taxpayer

Spouse

207,474

12/23/1947

Form 1310 Signature and Verification

Completion of this section indicates that I am requesting a refund of taxes overpaid by or on behalf of the decedent. Under penalties of perjury, I declare that I have examined this Form 1310 claim, and to the best of my knowledge and belief, it is true, correct and complete.

Signature of person claiming refund

Date

Form	1040	Department of the Treasury—Internal Revenue Service U.S. Individual Income Tax Return	2023	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.
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For the year Jan. 1–Dec. 31, 2023, or other tax year beginning _____, 2023, ending _____, 20_____ See separate instructions.

Your first name and middle initial Anne	Last name Gannon	Your social security number [REDACTED]
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. 236 N. Dixie Blvd.		Apt. no.	Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse	
City, town or post office. If you have a foreign address, also complete spaces below. Delray Beach		State FL		ZIP code 33444
Foreign country name	Foreign province/state/county	Foreign postal code		

Filing Status ☒ Single ☐ Head of household (HOH) ☐ Married filing jointly (even if only one had income) ☐ Married filing separately (MFS) ☐ Qualifying surviving spouse (QSS)

Check only one box.

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____

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):		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	
If more than four dependents, see instr. and check here ☐	(1) First name Last name			Child tax credit	Credit for other dependents

Income Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.	<table style="width:100%;"> <tr> <td style="width:5%;">1a</td> <td style="width:65%;">Total amount from Form(s) W-2, box 1 (see instructions)</td> <td style="width:5%;"></td> <td style="width:25%; text-align: right;">169,005</td> </tr> <tr><td>1b</td><td>Household employee wages not reported on Form(s) W-2</td><td></td><td></td></tr> <tr><td>1c</td><td>Tip income not reported on line 1a (see instructions)</td><td></td><td></td></tr> <tr><td>1d</td><td>Medicaid waiver payments not reported on Form(s) W-2 (see instructions)</td><td></td><td></td></tr> <tr><td>1e</td><td>Taxable dependent care benefits from Form 2441, line 26</td><td></td><td></td></tr> <tr><td>1f</td><td>Employer-provided adoption benefits from Form 8839, line 29</td><td></td><td></td></tr> <tr><td>1g</td><td>Wages from Form 8919, line 6</td><td></td><td></td></tr> <tr><td>1h</td><td>Other earned income (see instructions)</td><td></td><td></td></tr> <tr> <td>i</td> <td>Nontaxable combat pay election (see instructions)</td> <td style="text-align: center;">1i</td> <td></td> </tr> <tr> <td>z</td> <td>Add lines 1a through 1h</td> <td></td> <td style="text-align: right;">169,005</td> </tr> </table> <table style="width:100%;"> <tr> <td style="width:5%;">2a</td> <td style="width:40%;">Tax-exempt interest</td> <td style="width:5%;">2a</td> <td style="width:50%;"></td> <td style="width:5%;">b</td> <td style="width:40%;">Taxable interest</td> <td style="width:5%;"></td> <td style="width:50%; text-align: right;">3,809</td> </tr> <tr> <td>3a</td> <td>Qualified dividends</td> <td>3a</td> <td style="text-align: right;">1,672</td> <td>b</td> <td>Ordinary dividends</td> <td>3b</td> <td style="text-align: right;">3,261</td> </tr> <tr> <td>4a</td> <td>IRA distributions</td> <td>4a</td> <td></td> <td>b</td> <td>Taxable amount</td> <td>4b</td> <td style="text-align: right;">2,069</td> </tr> <tr> <td>5a</td> <td>Pensions and annuities</td> <td>5a</td> <td></td> <td>b</td> <td>Taxable amount</td> <td>5b</td> <td style="text-align: right;">12,862</td> </tr> <tr> <td>6a</td> <td>Soc. sec. ben.</td> <td>6a</td> <td style="text-align: right;">46,416</td> <td>b</td> <td>Taxable amount</td> <td>6b</td> <td style="text-align: right;">39,454</td> </tr> <tr> <td>c</td> <td colspan="7">If you elect to use the lump-sum election method, check here (see instructions) ☐</td> </tr> <tr> <td>7</td> <td>Capital gain or (loss). Attach Schedule D if required. If not required, check here</td> <td></td> <td></td> <td>7</td> <td></td> <td></td> <td style="text-align: right;">-3,000</td> </tr> <tr> <td>8</td> <td>Other income from Schedule 1, line 10</td> <td></td> <td></td> <td>8</td> <td></td> <td></td> <td style="text-align: right;">-11</td> </tr> <tr> <td>9</td> <td>Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income</td> <td></td> <td></td> <td>9</td> <td></td> <td></td> <td style="text-align: right;">227,449</td> </tr> <tr> <td>10</td> <td>Adjustments to income from Schedule 1, line 26</td> <td></td> <td></td> <td>10</td> <td></td> <td></td> <td style="text-align: right;">0</td> </tr> <tr> <td>11</td> <td>Subtract line 10 from line 9. This is your adjusted gross income</td> <td></td> <td></td> <td>11</td> <td></td> <td></td> <td style="text-align: right;">227,449</td> </tr> <tr> <td>12</td> <td>Standard deduction or itemized deductions (from Schedule A)</td> <td></td> <td></td> <td>12</td> <td></td> <td></td> <td style="text-align: right;">15,700</td> </tr> <tr> <td>13</td> <td>Qualified business income deduction from Form 8995 or Form 8995-A</td> <td></td> <td></td> <td>13</td> <td></td> <td></td> <td style="text-align: right;">27</td> </tr> <tr> <td>14</td> <td>Add lines 12 and 13</td> <td></td> <td></td> <td>14</td> <td></td> <td></td> <td style="text-align: right;">15,727</td> </tr> <tr> <td>15</td> <td>Subtract line 14 from line 11. If zero or less, enter -0-. 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For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.

Form **1040** (2023)

Form 1040 (2023) **Anne Gannon**Page **2****Tax and Credits**

16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972	16	46,299
3	☐	17	
17	Amount from Schedule 2, line 3	18	46,299
18	Add lines 16 and 17	19	
19	Child tax credit or credit for other dependents from Schedule 8812	20	10
20	Amount from Schedule 3, line 8	21	10
21	Add lines 19 and 20	22	46,289
22	Subtract line 21 from line 18. If zero or less, enter -0-	23	199
23	Other taxes, including self-employment tax, from Schedule 2, line 21	24	46,488
24	Add lines 22 and 23. This is your total tax		

Payments

25	Federal income tax withheld from:			25d	55,130
a	Form(s) W-2	25a	42,630		
b	Form(s) 1099	25b	12,455		
c	Other forms (see instructions)	25c	45		
d	Add lines 25a through 25c				
26	2023 estimated tax payments and amount applied from 2022 return			26	2,074
27	Earned income credit (EIC)	27			
28	Additional child tax credit from Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Reserved for future use	30			
31	Amount from Schedule 3, line 15	31			
32	Add lines 27, 28, 29 and 31. These are your total other payments and refundable credits	32			
33	Add lines 25d, 26, and 32. These are your total payments	33	57,204		

RefundIf you have a qualifying child, attach Sch. EIC.
Direct deposit?
See instructions.

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	10,716
35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐	35a	10,716
b	Routing number	c	Type: ☒ Checking ☐ Savings
d	Account number		
36	Amount of line 34 you want applied to your 2024 estimated tax	36	
37	Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions	37	
38	Estimated tax penalty (see instructions)	38	

Third Party Designee

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

Designee's name **Christina W. Stewart** Phone no. **954-271-4470** Personal identification number (PIN)

Sign HereJoint return?
See instructions.
Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see instr.)
Tax Collector			
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 instr.)

Phone no. **561-355-2805** Email address **regannon@bellsouth.net****Paid**Preparer's name **Christina W. Stewart** Preparer's signature **Christina W. Stewart** Date **05/02/24** PTIN **P00840123** Check if: ☐ Self-employed**Preparer Use Only**Firm's name **Witcher & Stewart, PA** Phone no. **954-271-4470**
Firm's address **1881 N University Dr Ste 106**
Coral Springs FL 33071 Firm's EIN **92-0352857**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

2023Attachment
Sequence No. **01**

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

Anne Gannon

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	-11
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling	8b	
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Income from Form 8853	8e	
f	Income from Form 8889	8f	
g	Alaska Permanent Fund dividends	8g	
h	Jury duty pay	8h	
i	Prizes and awards	8i	
j	Activity not engaged in for profit income	8j	
k	Stock options	8k	
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l	
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m	
n	Section 951(a) inclusion (see instructions)	8n	
o	Section 951A(a) inclusion (see instructions)	8o	
p	Section 461(l) excess business loss adjustment	8p	
q	Taxable distributions from an ABLE account (see instructions)	8q	
r	Scholarship and fellowship grants not reported on Form W-2	8r	
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	()
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t	
u	Wages earned while incarcerated	8u	
z	Other income. List type and amount:	8z	
9	Total other income. Add lines 8a through 8z	9	
10	Combine lines 1 through 7 and 9. This is your additional income . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	-11

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

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

2023Attachment
Sequence No. **02**

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

Your social security number

Anne Gannon**Part I Tax**

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

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	45
12	Net investment income tax. Attach Form 8960	12	154
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 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	199

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

2023Attachment
Sequence No. **03**

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

Your social security number

Anne Gannon**Part I Nonrefundable Credits**

1	Foreign tax credit. Attach Form 1116 if required	1	10
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	10

(continued on page 2)

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

Schedule 3 (Form 1040) 2023

SCHEDULE B
(Form 1040)**Interest and Ordinary Dividends**

OMB No. 1545-0074

2023Attachment
Sequence No. **08**Department of the Treasury
Internal Revenue Service

Attach to Form 1040 or 1040-SR.

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

Name(s) shown on return

Anne Gannon

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:

CAPITAL ONE N.A.**WELLS FARGO BANK, N.A.****RAYMOND JAMES & ASSOCIATES, INC. [J****RAYMOND JAMES & ASSOCIATES, INC. [C****Amount****3,764****20****1****24****1**

- 2 Add the amounts on line 1

2**3,809**

- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1980.
Attach Form 8815

3

- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b

4**3,809****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:

RAYMOND JAMES & ASSOCIATES, INC. [J**RAYMOND JAMES & ASSOCIATES, INC. [C****5****171****3,090**

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

6**3,261****Note:** If line 6 is over \$1,500, you must complete Part III.**Part III
Foreign
Accounts
and Trusts**

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

Yes No**X**

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

X

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

Schedule B (Form 1040) 2023

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

Anne Gannon

Your social security number

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

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	49,172	54,768	3	-5,591
2 Totals for all transactions reported on Form(s) 8949 with Box B checked	496	476	0	20
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	-5,571

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	9,685	9,855	0	-170
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	497	480	0	17
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824			11	
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			12	
13 Capital gain distributions. See the instructions			13	31
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	-122

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

Schedule D (Form 1040) 2023

Anne Gannon

Schedule D (Form 1040) 2023

Page 2

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	-5,693
	- If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. - If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. - If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.		
17	Are lines 15 and 16 both gains?		
	☐ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18	If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet	18	
19	If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet	19	
20	Are lines 18 and 19 both zero or blank and are you 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	(3,000)
	Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?		
	☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Schedule D (Form 1040) 2023

Form

8949**Sales and Other Dispositions of Capital Assets**

OMB No. 1545-0074

2023Department of the Treasury
Internal Revenue Service

File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Go to www.irs.gov/Form8949 for instructions and the latest information.Attachment
Sequence No. **12A**

Name(s) shown on return

Social security number or taxpayer identification number

Anne Gannon

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	See Statement	1		49,172	54,766		3	-5,591
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked)			49,172	54,766		3	-5,591

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

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

Form **8949** (2023)

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

Social security number or taxpayer identification number

Anne Gannon

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

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

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

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

☒ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	See Statement 2			9,685	9,855			-170
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked)			9,685	9,855		0	-170

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

Form

8949**Sales and Other Dispositions of Capital Assets**

OMB No. 1545-0074

2023Attachment
Sequence No. **12A**Department of the Treasury
Internal Revenue Service

File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Go to www.irs.gov/Form8949 for instructions and the latest information.

Name(s) shown on return

Social security number or taxpayer identification number

Anne Gannon

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).	
						(f) Code(s) from instructions	(g) Amount of adjustment		
	19.000 sh ENTERPRISE PRODUCTS PARTNERS L P	Various	Various	496	476			20	
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked)				496	476		0	20

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

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

Form **8949** (2023)

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

Social security number or taxpayer identification number

Anne Gannon

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

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

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

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

☐ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☒ (E) Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	19.000 sh ENTERPRISE PRODUCTS PARTNERS L P	03/25/22	04/05/23	497	80			17
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked)			497	480		0	17

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

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

Your social security number

Anne Gannon**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	ENTERPRISE PRODUCTS PARTNERS, L.P.	P		76-0568219		
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
A PTP 11			
B			
C			
D			
29a Totals			
b Totals 11			
30 Add columns (h) and (k) of line 29a		30	0
31 Add columns (g), (i), and (j) of line 29b		31	11
32 Total partnership and S corporation income or (loss). Combine lines 29 and 31		32	-11

Part III Income or Loss From Estates and Trusts

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

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

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

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b

39 Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below

39

Part V Summary

40	Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Schedule 1 (Form 1040), line 5	41	-11
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 real estate activities in which you materially participated under the passive activity loss rules	43	

Form **1116****Foreign Tax Credit**

(Individual, Estate, or Trust)

OMB No. 1545-0121

2023Attachment
Sequence No. **19**Department of the Treasury
Internal Revenue Service

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

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

Name

Identifying number as shown on page 1 of your tax return

Anne**Gannon**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) **US United States****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 cols. A, B, and C.)
		A	OC	B	
i Enter the name of the foreign country or U.S. possession		Other Countries			
1a Gross income from sources within country shown above and of the type checked above (see instructions):					
Dividends & Interest		110			1a 110
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)		15,700			
b Other ded. (attach stmt.)					
c Add lines 3a and 3b		15,700			
d Gross foreign source income (see instructions)		231			
e Gross income from all sources (see instructions)		231,869			
f Divide line 3d by line 3e (see instructions)		0.0010			
g Multiply line 3c by line 3f		16			
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		16			6 16
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2					7 94

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:			(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add cols. (q) through (t))
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties		(o) Interest	(q) Dividends	(r) Rents and royalties		
A	1099 Tax					10				10
B										
C										
8 Add lines A through C, column (u). Enter the total here and on line 9, page 2										8 10

For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2023)

Anne Gannon

Form 1116 (2023)

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	10	
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) ☐ (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	10	
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		10
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	94	
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	94	
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 Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	210,728	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		0.0004
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 6 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. Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 9978, Partner's Additional Reporting Year Tax, see instructions.	20		46,299
21	Multiply line 20 by line 19 (maximum amount of credit)	21		21
22	Increase in limitation (section 960 (c)) (see instructions)	22		
23	Add lines 21 and 22	23		21
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		10

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		10
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		10

Form

8995-A**Qualified Business Income Deduction**

OMB No. 1545-2294

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

Anne Gannon

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 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		

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	135	
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	135	
31 REIT and PTP component. Multiply line 30 by 20% (0.20)	31	27	
32 Qualified business income deduction before the income limitation. Add lines 27 and 31	32		27
33 Taxable income before qualified business income deduction	33	211,749	
34 Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	34	1,672	
35 Subtract line 34 from line 33. If zero or less, enter -0-	35		210,077
36 Income limitation. Multiply line 35 by 20% (0.20)	36		42,015
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		27
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		27
40 Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40	()	0

Form

8959**Additional Medicare Tax**

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

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

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

Go to www.irs.gov/Form8959 for instructions and the latest information.**2023**Attachment
Sequence No. **71**

Name(s) shown on return

Anne Gannon

Your social security number

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	204,963		
2	Unreported tips from Form 4137, line 6	2			
3	Wages from Form 8919, line 6	3			
4	Add lines 1 through 3	4	204,963		
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	200,000		
6	Subtract line 5 from line 4. If zero or less, enter -0-	6		4,963	
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II	7		45	

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	200,000		
10	Enter the amount from line 4	10	204,963		
11	Subtract line 10 from line 9. If zero or less, enter -0-	11	0		
12	Subtract line 11 from line 8. If zero or less, enter -0-	12		0	
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III	13			

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

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

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-SS filers, see instructions), and go to Part V	18	45
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Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	3,017		
20	Enter the amount from line 1	20	204,963		
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	2,972		
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		45	
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23			
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-SS filers, see instructions)	24		45	

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

Form **8959** (2023)

Form

8960**Net Investment Income Tax—
Individuals, Estates, and Trusts**

Attach to your tax return.

OMB No. 1545-2227

2023Attachment
Sequence No. **72**Department of the Treasury
Internal Revenue ServiceGo to www.irs.gov/Form8960 for instructions and the latest information.

Name(s) shown on your tax return

Your social security number or EIN

Anne Gannon**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	3,809
2	Ordinary dividends (see instructions)	2	3,261
3	Annuities (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions)	4a	-11
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	-11
5a	Net gain or loss from disposition of property (see instructions)	5a	-3,000
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	-3,000
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)	6	
7	Other modifications to investment income (see instructions)	7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7	8	4,059

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	4,059
13	Modified adjusted gross income (see instructions)	13	227,449
14	Threshold based on filing status (see instructions)	14	200,000
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	27,449
16	Enter the smaller of line 12 or line 15	16	4,059
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	154
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	

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

Form **8960** (2023)

Form **1040**

Tax Return Reconciliation Worksheet

2023Filing Status: ☒ 1 Single ☐ 2 Married filing jointly ☐ 3 Married filing separately ☐ 4 Head of household* ☐ 5 Qualifying widow(er)*
MFS spouse name: _____ *Qualifying person that is a child but not a dependent:

Taxpayer first name and initial Anne	Last name Gannon	Taxpayer social security number [REDACTED]
If a joint return, spouse's first name and initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. 236 N. Dixie Blvd.	Apt. no.	Presidential Election Campaign Taxpayer ☐ Spouse ☐
City, town or post office, state, and ZIP code. Delray Beach FL 33444		
Foreign country name	Foreign province/state/county	Foreign postal code

At anytime during 2023, did you receive, sell, send, exchange, or otherwise acquire financial interest in any digital assets? Yes ☐ No ☒

6a ☒ Taxpayer. If someone can claim you as a dependent, do not check box 6a	Boxes checked on 6a and 6b	1
6b ☐ Spouse	Children on 6c who lived with you	
	Children on 6c who did not live with you	
	Dependents on 6c not entered above	
	Total. Add lines above	1

6c Dependents:			(4) ☒ if qualifies for		If more than four dependents, ☐ here
(1) First name	Last name	(2) Social security number	(3) Relationship to you	Child tax credit	

Income (Schedule 1)	7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	169,005			
	8a	Taxable interest. Attach Schedule B if required	8a	3,809			
	b	Tax-exempt interest. Do not include on line 8a	8b				
	9a	Ordinary dividends. Attach Schedule B if required	9a	3,261			
	b	Qualified dividends	9b	1,672			
	10	Taxable refunds, credits, or offsets of state and local income taxes	10				
	11	Alimony received	11				
	12	Business income or (loss). Attach Schedule C or C-EZ	12				
	13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐	13	-3,000			
	14	Other gains or (losses). Attach Form 4797	14				
Adjusted Gross Income (Schedule 1)	15a	IRA distributions	15a		b Taxable amount	15b	2,069
	16a	Pensions and annuities	16a		b Taxable amount	16b	12,862
	17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	-11			
	18	Farm income or (loss). Attach Schedule F	18				
	19	Unemployment compensation	19				
	20a	Social security benefits	20a	46,416	b Taxable amount	20b	39,454
	21	Other income. List type and amount	21				
	22	Combine the amounts in the far right column for lines 7 through 21. This is your total income	22	227,449			
	23	Educator expenses	23				
	24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24				
	25	Health savings account deduction. Attach Form 8889	25				
	26	Moving expenses. Attach Form 3903	26				
	27	Deductible part of self-employment tax. Attach Schedule SE	27				
	28	Self-employed SEP, SIMPLE, and qualified plans	28				
	29	Self-employed health insurance deduction	29				
	30	Penalty on early withdrawal of savings	30				
	31a	Alimony paid b Recipient's SSN ▶	31a				
32	IRA deduction	32					
33	Student loan interest deduction	33					
34	Reserved for future use	34					
35	Reserved for future use	35					
36	Add lines 23 through 35	36					
37	Subtract line 36 from line 22. This is your adjusted gross income	37	227,449				

Form **1040****Tax Return Reconciliation Worksheet, Page 2****2023**Name **Anne Gannon**

Tp TIN

Tax and Credits
(Schedules 2, 3)**Standard Deduction for—**

• People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions.

• All others:

Single or Married filing separately, \$13,850

Married filing jointly or Qualifying widow(er), \$27,700

Head of household, \$20,800

38	Amount from line 37 (adjusted gross income)	38	227,449
39a	Check ☒ You were born before January 2, 1959, ☐ Blind. ☐ Spouse was born before January 2, 1959, ☐ Blind. Total boxes checked 1	39a	1
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ☐	39b	
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	15,700
40b		40b	
41	Subtract line 40 and 40b from line 38	41	211,749
42	Qualified business income deduction (see instructions)	42	27
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	211,722
44	Tax (see instr.). Check if any from: a ☐ Form(s) 8814 b ☐ Form 4972 c ☐	44	46,299
45	Alternative minimum tax (see instructions). Attach Form 6251	45	
46	Excess advance premium tax credit repayment. Attach Form 8962	46	
47	Add lines 44, 45, and 46	47	46,299
48	Foreign tax credit. Attach Form 1116 if required	48	10
49	Credit for child and dependent care expenses. Attach Form 2441	49	
50	Education credits from Form 8863, line 19	50	
51	Retirement savings contributions credit. Attach Form 8880	51	
52	Child tax credit/credit for other dependents	52	
53	Residential energy credits. Attach Form 5695	53	
54	Other credits from Form(s) ☐ 3800 b ☐ 8801 c ☐	54	
55	Add lines 48 through 54. These are your total credits	55	10
56	Subtract line 55 from line 47. If line 55 is more than line 47, enter -0-	56	46,289
57	Self-employment tax. Attach Schedule SE	57	
58	Unreported social security and Medicare tax from Form: a ☐ 4137 b ☐ 8919	58	
59	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	59	
60a	Household employment taxes from Schedule H	60a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	60b	
61	Taxes from: a ☒ Form 9999 b ☒ Form 9960 c ☐ Instructions. Enter code(s) See Statement	61	199
62	Section 965 net tax liability installment from Form 965-A	62	
63	Add lines 56 through 61. This is your total tax	63	46,488
64	Federal income tax withheld from:		
a	Form(s) W-2	64a	42,630
b	Form(s) 1099	64b	12,455
c	Other forms	64c	45
65	2023 estimated tax payments and amount applied from 2022 return	65	2,074
66	Earned income credit (EIC)	66	
67	Additional child tax credit. Attach Schedule 8812	67	
68	American opportunity credit from Form 8863, line 8	68	
69	Recovery rebate credit	69	
70	Net premium tax credit. Attach Form 8962	70	
71	Amount paid with request for extension to file	71	
72	Excess social security and tier 1 RRTA tax withheld	72	
73	Credit for federal tax on fuels. Attach Form 4136	73	
74	Other payments and refundable credits	74	
75	Total pymts. Add lines 64 - 74.	75	57,204
76	If line 75 is more than line 63, subtract line 63 from line 75. This is the amount you overpaid	76	10,716
77a	Amount of line 76 you want refunded to you. If Form 8888 is attached, check here ☐	77a	10,716
b	Routing number ☐ Type: ☒ Checking ☐ Savings		
d	Account number ☐		
78	Amount of line 76 you want applied to your 2024 estimated tax	78	
79	Amount you owe. Subtract line 75 from line 63. For details on how to pay, see instructions	79	
80	Estimated tax penalty (see instructions)	80	

Other Taxes
(Schedule 2)**Payments**
(Schedule 3)**Refund****Amount You Owe****Int/Pen****Third Party Designee****Other Info**Do you want to allow another person to discuss this return with the IRS (see instructions)? ☒ Yes. Complete below. ☐ NoDesignee's Name **Christina W. Stewart**Personal identification no. (PIN) ☐Phone no. **954-271-4470**

Taxpayer Daytime phone number

561-355-2805

Taxpayer: Occupation

Tax Collector

IRS Identity Protection PIN

Spouse: Occupation

IRS Identity Protection PIN

☒ Taxpayer☐ Spouse

Email address

regannon@bellsouth.net

Federal Statements

Statement 1 - Form 8949 - Sales and Other Dispositions of Capital Assets Part I -
Short-Term

Description of Property	Date Acquired	Date Sold	Proceeds (Sales Price)	Cost/ Basis	Codes for Col (g)	Amount of Adjustment	Gain or (Loss)
			\$			\$	\$
3.000 sh ABBVIE INCORPORATED	Various	Various	452	479			-27
2.000 sh ALPHABET INCORPORATED CAP STK CLASS	11/21/22	1/25/23	189	192			-3
2.000 sh AMAZON COM INCORPORATED	11/21/22	1/25/23	189	184			5
1.000 sh AMEX COMPANY	3/25/22	1/25/23	155	190			-35
1.000 sh ARES MANAGEMENT CORPORATION CLASS A	3/25/22	1/25/23	78	78			
1,253.828 sh BROOKFIELD REAL ASSETS INCOME SHS BE	Various	Various	16,166	20,588	W	3	-4,425
5.000 sh CME GROUP INCORPORATED	Various	Various	918	940			-21
2.000 sh CLOROX COMPANY DEL	11/21/22	1/25/23	277	298			-21
2.000 sh CONOCOPHILLIPS	3/25/22	1/25/23	237	208			29
3.000 sh CUMMINS INCORPORATED	Various	Various	700	705			-5
2.000 sh DIGITAL RLTY TR INCORPORATED REIT	11/21/22	1/25/23	211	218			-7
6.000 sh EXXON MOBIL CORPORATION	3/25/22	1/13/23	702	643			59
5.000 sh GENUINE PARTS COMPANY	Various	Various	811	840			-29
15.000 sh HASBRO INCORPORATED	Various	Various	925	1,045			-120
1.000 sh HOME DEPOT INCORPORATED	3/25/22	1/25/23	315	318			-3
109.000 sh IQ FTSE INTERNATIONAL EQUITY CURRENC	Various	Various	2,509	2,580			-71
7.000 sh INTEL CORPORATION	11/21/22	1/25/23	207	203			4
24.000 sh INTERPUBLIC GROUP COMPANIES INCORPOR	Various	Various	930	747			183
7.000 sh INVESCO QQQ TR	Various	Various	2,016	2,517			-501
53.000 sh JPMORGAN ULTRA-SHORT INCOME ETF	Various	Various	2,666	2,659			7
1.000 sh JOHNSON & JOHNSON	3/25/22	1/25/23	168	176			-8
2.000 sh KEURIG DR PEPPER INCORPORATED	3/25/22	1/25/23	69	74			-5
19.000 sh KEYCORP	Various	Various	254	370			-116
1.000 sh LAMAR ADVERTISING COMPANY NEW CLASS	3/25/22	1/25/23	101	113			-12

Federal Statements

Statement 1 - Form 8949 - Sales and Other Dispositions of Capital Assets Part I -
Short-Term (continued)

Description of Property	Date Acquired	Date Sold	Proceeds (Sales Price)	Cost/ Basis	Codes for Col (g)	Amount of Adjustment	Gain or (Loss)
1.000 sh MERCK & COMPANY INCORPORATED	7/06/22	1/25/23	\$ 109	\$ 94			15
2.000 sh NIKE INCORPORATED CLASS B	3/25/22	1/25/23	253	266			-13
6.000 sh OLD REP INTERNATIONAL CORPORATION	3/25/22	1/25/23	146	156			-10
3.000 sh PFIZER INCORPORATED	3/25/22	1/25/23	134	158			-24
3.000 sh PHILIP MORRIS INTERNATIONAL INCORPORATED	11/04/22	1/25/23	306	268			40
3.000 sh PHILLIPS 66	11/04/22	1/25/23	324	311			11
3.000 sh PIONEER NAT RES COMPANY	4/05/23	10/24/23	778	629			109
1.000 sh PRICE T ROME GROUP INCORPORATED	11/21/22	1/25/23	114	121			-7
3.000 sh PROLOGIS INCORPORATED, REIT	11/21/22	1/25/23	375	343			32
1.000 sh PUBLIC SVC ENTERPRISE GRP INCORPORATED	3/25/22	1/25/23	60	68			-8
25.000 sh SCHWAB U.S. LARGE-CAP VALUE ETF	Various	Various	1,685	1,570			115
20.000 sh SPDR REAL ESTATE SELECT SECTOR FUND	Various	Various	783	935			-152
1.000 sh SNAP ON INCORPORATED	11/21/22	3/28/23	239	237			2
6.000 sh BLOCK INCORPORATED CLASS A	11/21/22	1/25/23	467	370			97
11.000 sh TAPESTRY INCORPORATED	11/04/22	1/25/23	476	351			125
14.000 sh TARGET CORPORATION	Various	Various	1,969	2,304			-335
5.000 sh UNILEVER PLC SPON ADR NEW (UNITED KI	9/02/22	1/25/23	250	224			26
4.000 sh UNION PAC CORPORATION	Various	Various	805	858			-53
2.000 sh UNITED PARCEL SERVICE INCORPORATED C	9/02/22	1/25/23	352	391			-39
26.000 sh VANECK FALLEN ANGEL HIGH YIELD BOND	Various	Various	724	783			-59
56.000 sh VANGUARD INTERMEDIATE-TERM BOND ETF	Various	Various	4,249	4,490			-241
2.000 sh VANGUARD MID-CAP ETF	3/25/22	1/25/23	427	475			-48
7.000 sh VANGUARD SMALL-CAP ETF	Various	Various	1,374	1,490			-116
2.000 sh WALMART INCORPORATED	3/25/22	1/25/23	283	286			-3

Federal Statements

Statement 1 - Form 8949 - Sales and Other Dispositions of Capital Assets Part I -

Short-Term (continued)

Description of Property	Date Acquired	Date Sold	Proceeds (Sales Price)	Cost/ Basis	Codes for Col (g)	Amount of Adjustment	Gain or (Loss)
1.000 sh WATSCO INCORPORATED	3/28/23	6/20/23	\$ 354	\$ 310		\$	\$ 44
67.403 sh WEITZ CORE PLUS INCOME FUND INSTL CL	3/03/23	7/21/23	652	649			3
11.000 sh INTERNATIONAL GAME TECHNOLOGY SHS US	11/21/22	1/25/23	284	264			20
Total			\$ 49,172	\$ 54,766		\$ 3	\$ -5,591

Statement 2 - Form 8949 - Sales and Other Dispositions of Capital Assets Part II -

Long-Term

Description of Property	Date Acquired	Date Sold	Proceeds (Sales Price)	Cost/ Basis	Codes for Col (g)	Amount of Adjustment	Gain or (Loss)
3.000 sh ABBVIE INCORPORATED	3/25/22	3/28/23	\$ 474	\$ 482		\$	\$ -8
1.000 sh APPLE INCORPORATED	3/08/22	1/25/23	140	137			3
1.000 sh CUMMINS INCORPORATED	1/25/23	3/28/23	229	209			20
3.000 sh HASBRO INCORPORATED	3/25/22	6/20/23	182	257			-75
1.000 sh HOME DEPOT INCORPORATED	2/08/21	1/25/23	315	279			36
60.000 sh IQ FTSE INTERNATIONAL EQUITY CURRENC	3/25/22	7/21/23	1,454	1,420			34
4.000 sh INTERPUBLIC GROUP COMPANIES INCORPOR	3/25/22	6/20/23	158	144			14
7.000 sh INVESCO QQQ TR	3/25/22	7/21/23	2,654	2,517			137
2.000 sh JPMORGAN CHASE & COMPANY	2/08/21	1/25/23	276	280			-4
32.000 sh KEYCORP	3/25/22	3/28/23	402	757			-355
1.000 sh MICROSOFT CORPORATION	2/08/21	1/25/23	237	242			-5
18.000 sh SCHWAB U.S. LARGE-CAP VALUE ETF	7/15/22	7/21/23	1,239	1,131			108
9.000 sh SPDR REAL ESTATE SELECT SECTOR FUND	3/25/22	7/21/23	347	421			-74
2.000 sh SNAP ON INCORPORATED	3/25/22	3/28/23	478	415			63

Statement 2 - Form 8949 - Sales and Other Dispositions of Capital Assets Part II -
Long-Term (continued)

Description of Property	Date Acquired	Date Sold	Proceeds (Sales Price)	Cost/ Basis	Codes for Col (g)	Amount of Adjustment	Gain or (Loss)
15,000 sh VANECK FALLEN ANGEL HIGH YIELD BOND	3/25/22	7/21/23	\$ 416	\$ 452		\$	\$ -36
3,000 sh VANGUARD MID-CAP ETF	3/25/22	7/21/23	684	712			-28
Total			<u>\$ 9,685</u>	<u>\$ 9,855</u>		<u>\$ 0</u>	<u>\$ -170</u>

Client Copy

Form **1040****Partner's Basis Worksheet Page 1****2023**

Name

Anne Gannon

Taxpayer Identification Number

Name of Entity **ENTERPRISE PRODUCTS PARTNERS, L.P.**EIN **76-0568219**Passive Activity Type **Publicly Traded**

K1 Unit

1

1. Beginning of year basis. Per IRC 705(a)(2) do not enter an amount below zero	1.	836
Increases to basis:		
2. Capital contributions: Cash	2.	
3. Capital contributions: Property (adjusted basis)	3.	
4. Increase in share of partnership liabilities	4.	
5. Ordinary business income	5.	
6. Net rental real estate income	6.	
7. Other net rental income	7.	
8. Interest	8.	
9. Dividends	9.	
10. Royalties	10.	
11. Net short-term capital gain	11.	
12. Net long-term capital gain	12.	
13. Net 28% rate capital gain	13.	
14. Net section 1231 gain and ordinary business gains	14.	
15. Tax-exempt interest, other tax-exempt income, and recapture of credits	15.	
16. Other income	16.	
17. Excess of deductions for depletion over basis of property (other than oil and gas)	17.	
18a. Other increases	18a.	
18b. Business interest expense (BIE)	18b.	
19. Total increases to basis. Combined lines 2 through 18	19.	0
20. Adjusted basis before items decreasing basis. Add line 1 and line 19	20.	836
Decreases to basis:		
21. Distributions: Cash and marketable securities (Sch K-1 (1065), Box 19)	21.	14
22. Distributions: Property (adjusted basis) (Sch K-1 (1065), Box 19)	22.	
23. Decrease in share of partnership liabilities	23.	
24. Total distributions. Combine lines 21 through 23	24.	14
25. Nondeductible and non-capital expenses.	25.	0
26. Oil and gas property depletion deduction up to adjusted basis of property	26.	
27. Other decreases	27.	
28. Total decreases to basis except items of loss and deductions. Combine lines 24 through 27	28.	14
29. Adjusted basis before items of loss or deductions (Subtract line 28 from line 20. Do not enter less than zero)	29.	822
30. Partnership losses and deductions applied against basis. (See Partner's Basis Worksheet Page 2)	30.	11
31. Basis at the end of the year. (Subtract line 30 from line 29. Do not enter less than zero)	31.	811

Gain Recognized on Distributions

32. Total distributions less property distributions. Subtract line 22 from line 24	32.	14
33. Adjusted basis before items decreasing basis (line 20) less gain from entire disposition of partnership on line 27.	33.	836
34. Gain recognized on excess distributions. (Subtract line 33 from line 32)	34.	0
• Sch E page 2, ordinary income		
• Sch D/8949, short-term capital gain		
• Sch D/8949, long-term capital gain		
35. Gain recognized on appreciated property	35.	
36. Total gain recognized on distributions	36.	0

Form **1040****Partner's Basis Worksheet Page 2****2023**

Name

Anne Gannon

Taxpayer Identification Number

Name of Entity **ENTERPRISE PRODUCTS PARTNERS, L.P.**EIN **76-0568219**Passive Activity Type **Publicly Traded**

K1 Unit

1

Description	Suspended Amount	Current Year	Total Loss	Percent	Allowed Loss	Disallowed Loss Carryforward
Nondeductible noncap exp						
Nondeductible expenses						
Partnership losses and deductions						
Ordinary business loss		11	11	1.0000	11	
Net rental real estate loss						
Other net rental loss						
Short-term capital loss						
Long-term capital loss						
28% capital loss						
Section 1231 loss						
4797 - Ordinary loss						
Other portfolio loss						
1256 contracts/straddles						
Other losses - Sch E						
Other losses - 1040 Sch 1						
Section 179 expense						
Cash contributions						
Cash contributions (30%)						
Noncash contrib (50%)						
Noncash contrib (30%)						
Cap gain prop 50% (30%)						
Cap gain prop (20%)						
Portfolio deduct (other)						
Investment interest expense						
Depletion						
Deductions-royalty income						
Section 59(e)(2) expenditures						
Preproductive period exp.						
Reforestation expense ded.						
Foreign taxes						
Other deductions						
Total losses and deductions		11	11	1.0000	11	

Form **1040****Broker Reconciliation Worksheet****2023**

Name(s) of Account holder

Anne Gannon

Taxpayer identification number

Payer's name

RAYMOND JAMES & ASSOCIATES, INC. [J

Account number

265VJ674

Form/Schedule/Worksheet	Form/Sch Line No.	Form 1099		Amount
		Name	Box No(s)	
Schedule B				
Part I - Interest	1	1099-INT	1, 3, 10	1
Part II - Ordinary Dividends	5	1099-DIV	1a	171
Nondividend distributions		1099-DIV	3	77
Schedule D				
Short-term 1099B transactions with no adjustments, basis reported to IRS	1a	1099-B		
Long-term 1099B transactions with no adjustments, basis reported to IRS	8a	1099-B		
Part II - Capital gain distributions	13	1099-DIV	2a	
28% Rate Capital Gain Worksheet (Schedule D, line 18)	1, 4	1099-DIV, B	2d, 3	
Unrecaptured Section 1250 Gain Worksheet (Schedule D, line 19)	11	1099-DIV	2b	
Schedule A				
State and local income taxes withheld	5a	1099 ALL	17, 15, 16	
Foreign tax deduction	6	1099-INT, DIV	6, 7	
Form 1040				
Tax-exempt interest	2a	1099-INT	8	
Tax-exempt interest dividends	2b	1099-DIV	11	
Qualified dividends	3	1099-DIV	1b	171
Penalty on early withdrawal of savings (Schedule 1)	16	1099-INT	2	
Foreign tax credit (Credit claimed without filing Form 1116) (Schedule 3)	1	1099-INT, DIV	6, 7	
Federal income tax withheld	25b	1099 ALL	4	
Section 199A dividends	13	1099-DIV	5	
Form 1116				
Part II Foreign taxes paid or accrued	8	1099-INT, DIV	6, 7	
Form 6251				
Interest from specified private activity bonds exempt from regular tax	2g	1099-INT	9	
Interest dividends from specified private activity bonds exempt from regular tax	2g	1099-DIV	12	
Form 8949				
Basis reported to IRS				
Short-term - 8949 Box A	1	1099-B		
Short-term - 8949 Box A (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box D	1	1099-B		
Long-term - 8949 Box D (column g) - Wash sale loss disallowed *	1	1099-B		
Basis not reported to IRS				
Short-term - 8949 Box B	1	1099-B		
Short-term - 8949 Box B (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box E	1	1099-B		
Long-term - 8949 Box E (column g) - Wash sale loss disallowed *	1	1099-B		
Not reported on Form 1099-B				
Short-term - 8949 Box C	1	1099-B		
Short-term - 8949 Box C (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F	1	1099-B		
Long-term - 8949 Box F (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F - Section 1202 gain exclusion adjustment	1	1099-DIV	2c	
Form 6781				
Net section 1256 contracts loss election				
Part I - Section 1256 Contracts Marked to Market	1	1099-B	11	
Form 1099-B adjustments	4			
Net section 1256 contracts loss carry back	6			
Form 4952				
Investment interest expenses - margin interest	1			

* Form 8949 column (g), amount of adjustment, is reported as wash sale loss disallowed for any transaction with a "W" in column (f) Code(s) from instructions. Therefore, transactions with multiple codes in column (f), may not reflect the true disallowed wash sale loss.

Form **1040****Broker Reconciliation Worksheet****2023**

Name(s) of Account holder

Anne Gannon

Taxpayer identification number

Payer's name

RAYMOND JAMES & ASSOCIATES, INC. [C

Account number

5823C674

Form/Schedule/Worksheet	Form/Sch Line No.	Form 1099		Amount
		Name	Box No(s)	
Schedule B				
Part I - Interest	1	1099-INT	1, 3, 10	24
Part II - Ordinary Dividends	5	1099-DIV	1a	3,090
Nondividend distributions		1099-DIV	3	1,103
Schedule D				
Short-term 1099B transactions with no adjustments, basis reported to IRS	1a	1099-B		
Long-term 1099B transactions with no adjustments, basis reported to IRS	8a	1099-B		
Part II - Capital gain distributions	13	1099-DIV	2a	31
28% Rate Capital Gain Worksheet (Schedule D, line 18)	1, 4	1099-DIV, B	2d, 3	
Unrecaptured Section 1250 Gain Worksheet (Schedule D, line 19)	11	1099-DIV	2b	6
Schedule A				
State and local income taxes withheld	5a	1099 ALL	17, 15, 16	
Foreign tax deduction	6	1099-INT, DIV	6, 7	
Form 1040				
Tax-exempt interest	2a	1099-INT	8	
Tax-exempt interest dividends	2b	1099-DIV	11	
Qualified dividends	3	1099-DIV	1b	1,501
Penalty on early withdrawal of savings (Schedule 1)	16	1099-INT	2	
Foreign tax credit (Credit claimed without filing Form 1116) (Schedule 3)	1	1099-INT, DIV	6, 7	
Federal income tax withheld	25b	1099 ALL	4	
Section 199A dividends	13	1099-DIV	5	146
Form 1116				
Part II Foreign taxes paid or accrued	8	1099-INT, DIV	6, 7	10
Form 6251				
Interest from specified private activity bonds exempt from regular tax	2g	1099-INT	9	
Interest dividends from specified private activity bonds exempt from regular tax	2g	1099-DIV	12	
Form 8949				
Basis reported to IRS				
Short-term - 8949 Box A	1	1099-B		-5,591
Short-term - 8949 Box A (column g) - Wash sale loss disallowed *	1	1099-B		-3
Long-term - 8949 Box D	1	1099-B		-170
Long-term - 8949 Box D (column g) - Wash sale loss disallowed *	1	1099-B		
Basis not reported to IRS				
Short-term - 8949 Box B	1	1099-B		20
Short-term - 8949 Box B (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box E	1	1099-B		17
Long-term - 8949 Box E (column g) - Wash sale loss disallowed *	1	1099-B		
Not reported on Form 1099-B				
Short-term - 8949 Box C	1	1099-B		
Short-term - 8949 Box C (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F	1	1099-B		
Long-term - 8949 Box F (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F - Section 1202 gain exclusion adjustment	1	1099-DIV	2c	
Form 6781				
Net section 1256 contracts loss election				
Part I - Section 1256 Contracts Marked to Market	1	1099-B	11	
Form 1099-B adjustments	4			
Net section 1256 contracts loss carry back	6			
Form 4952				
Investment interest expenses - margin interest	1			

* Form 8949 column (g), amount of adjustment, is reported as wash sale loss disallowed for any transaction with a "W" in column (f) Code(s) from instructions. Therefore, transactions with multiple codes in column (f), may not reflect the true disallowed wash sale loss.

Form **1040****Broker Capital Transactions Detail Summary Report****2023**

Name(s) shown on return

Anne Gannon

Taxpayer Identification Number

Broker Account Name

Account No.

T/S/J

A **RAYMOND JAMES & ASSOCIATES, INC.****T****B****C****D****E**

Column A

Column B

Column C

Column D

Column E

Total Col A - E*

Basis reported to the IRS

Short-term - Sch D line 1a

Proceeds	+					
Basis	-					
Gain/-Loss	=					0

Long-term - Sch D line 8a

Proceeds	+					
Basis	-					
Gain/-Loss	=					0

Short-term - 8949 Box A / Sch D line 1b

Proceeds	+	49,172				49,172
Basis	-	54,766				54,766
Adjustment	+	3				3
Gain/-Loss	=	-5,591				-5,591

Long-term - 8949 Box D / Sch D line 8b

Proceeds	+	9,685				9,685
Basis	-	9,855				9,855
Adjustment	+					
Gain/-Loss	=	-170				-170

Basis not reported to the IRS

Short-term - 8949 Box B / Sch D line 2

Proceeds	+	496				496
Basis	-	476				476
Adjustment	+					
Gain/-Loss	=	20				20

Long-term - 8949 Box E / Sch D line 9

Proceeds	+	497				497
Basis	-	480				480
Adjustment	+					
Gain/-Loss	=	17				17

Not reported on 1099B/Substitute statement

Short-term - 8949 Box C / Sch D line 3

Proceeds	+					
Basis	-					
Adjustment	+					
Gain/-Loss	=					0

Long-term - 8949 Box F / Sch D line 10

Proceeds	+					
Basis	-					
Adjustment	+					
Gain/-Loss	=					0

Account Total

Proceeds	+	59,850				59,850
Basis	-	65,577				65,577
Adjustment	+	3				3
Gain/-Loss	=	-5,724				-5,724

*Total column completed on last unit

Form **1040****Capital Loss Carryover Worksheets****2023**

Name

Anne Gannon

Taxpayer Identification Number

2023 to 2024 Capital Loss Carryover Worksheet

Use this worksheet to figure your capital loss carryovers from 2023 to 2024 if Schedule D, Line 21, is a loss and (a) that loss is a smaller loss than the loss on Schedule D, line 16, or (b) Form 1040, line 15, is less than zero. Otherwise, you do not have any carryovers.

1. Enter the amount from Form 1040, line 15. If a loss, enclose the amount in parentheses	1.	211,722
2. Enter the loss from Schedule D, line 21, as a positive amount	2.	3,000
3. Combine lines 1 and 2. If zero or less, enter -0-	3.	214,722
4. Enter the smaller of line 2 or line 3	4.	3,000
If line 7 of Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.		
5. Enter the loss from Schedule D, line 7, as a positive amount	5.	5,571
6. Enter any gain from Schedule D, line 15. If a loss, enter -0-	6.	
7. Add lines 4 and 6	7.	3,000
8. Short-term capital loss carryover to 2024. Subtract line 7 from line 5. If zero or less, enter -0-	8.	2,571
If line 15 of Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.		
9. Enter the loss from Schedule D, line 15, as a positive amount	9.	122
10. Enter any gain from Schedule D, line 7	10.	
11. Subtract line 5 from line 4. If zero or less, enter -0-	11.	0
12. Add lines 10 and 11	12.	
13. Long-term capital loss carryover to 2024. Subtract line 12 from line 9. If zero or less, enter -0-	13.	122

2023 to 2024 Capital Loss Carryover Worksheet, AMT

Use this worksheet to figure AMT capital loss carryovers from 2023 to 2024 if AMT Schedule D, Line 21, is a loss and (a) that loss is a smaller loss than the loss on AMT Schedule D, line 16 or (b) Form 6251, line 4 is a loss. Otherwise, you do not have any carryovers.

1. Enter the amount from Form 6251, line 4. If a loss, enclose the amount in parentheses	1.	227,422
2. Enter the loss from AMT Schedule D, line 21 as a positive amount	2.	3,000
3. Combine lines 1 and 2. If zero or less, enter -0-	3.	230,422
4. Enter the smaller of line 2 or line 3	4.	3,000
If line 7 of AMT Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.		
5. Enter the loss from AMT Schedule D, line 7 as a positive amount	5.	5,571
6. Enter the gain, if any, from AMT Schedule D, line 15	6.	
7. Add lines 4 and 6	7.	3,000
8. AMT Short-term capital loss carryover to 2024. Subtract line 7 from line 5. If zero or less, enter -0-	8.	2,571
If line 15 of AMT Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.		
9. Enter the loss from AMT Schedule D, line 15, as a positive amount	9.	122
10. Enter the gain, if any, from AMT Schedule D, line 7	10.	
11. Subtract line 5 from line 4. If zero or less, enter -0-	11.	0
12. Add lines 10 and 11	12.	
13. AMT Long-term capital loss carryover to 2024. Subtract line 12 from line 9. If zero or less, enter -0-	13.	122

Form 982 Reduction of Capital Loss Carryovers to 2024

	Regular	AMT
1. Subtract 2023 to 2024 Capital Loss Carryover Worksheet, line 7 from line 5	1.	
2. Form 982 line 9 reduction of tax attributes applied to short-term capital loss carryover	2.	
3. Adjusted Short-term capital loss carryover to 2024. Subtract line 2 from line 1. Enter this amount on line 8 in the 2023 to 2024 Capital Loss Carryover Worksheet	3.	
4. Subtract 2023 to 2024 Capital Loss Carryover Worksheet, line 12 from line 9	4.	
5. Form 982 line 9 reduction of tax attributes applied to long-term capital loss carryover	5.	
6. Adjusted Long-term capital loss carryover to 2024. Subtract line 5 from line 4. Enter this amount on line 13 in the 2023 to 2024 Capital Loss Carryover Worksheet	6.	

Form **1040****Qualified Dividends and Capital Gain Tax Worksheet****2023**

Name

Taxpayer Identification Number

Anne Gannon

1. Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	211,722	
2. Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 3a*	2.	1,672	
3. Are you filing Schedule D?*			
☒ Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is a loss, enter -0-			
☐ No. Enter the amount from Form 1040, 1040-SR, or 1040-NR, line 7	3.		
4. Add lines 2 and 3	4.	1,672	
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	210,050	
6. Enter:			
\$44,625 if single or married filing separately,			
\$89,250 if married filing jointly or qualifying surviving spouse,	6.	44,625	
\$59,750 if head of household.			
7. Enter the smaller of line 1 or line 6	7.	44,625	
8. Enter the smaller of line 5 or line 7	8.	44,625	
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	0	
10. Enter the smaller of line 1 or line 4	10.	1,672	
11. Enter the amount from line 9	11.	0	
12. Subtract line 11 from line 10	12.	1,672	
13. Enter:			
\$492,300 if single,			
\$276,900 if married filing separately,	13.	492,300	
\$553,850 if married filing jointly or qualifying surviving spouse,			
\$523,050 if head of household.			
14. Enter the smaller of line 1 or line 13	14.	211,722	
15. Add lines 5 and 9	15.	210,050	
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	1,672	
17. Enter the smaller of line 12 or line 16	17.	1,672	
18. Multiply line 17 by 15% (0.15)	18.	251	
19. Add lines 9 and 17	19.	1,672	
20. Subtract line 19 from line 10	20.	0	
21. Multiply line 20 by 20% (0.20)	21.	0	
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	46,048	
23. Add lines 18, 21, and 22	23.	46,299	
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	46,583	
25. Tax on all taxable income. Enter the smaller of line 23 or line 24. Also include this amount on the entry space on Form 1040, 1040-SR, or 1040-NR, line 16. If you are filing Form 2555, do not enter this amount on the entry space on 1040, 1040-SR, or 1040-NR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	46,299	

*If you are filing Form 2555, these lines may be reduced (but not below zero) by your capital gain excess. Please refer to Foreign Earned Income Tax Worksheets - Excess Capital Gain for detail if the lines have been reduced.

Form **1040****Standard Deduction & Dependent MAGI Worksheets****2023**

Name

Anne Gannon

Taxpayer Identification Number

Standard Deduction Worksheet

1. Enter the amount shown below for your filing status.

- Single or Married filing separately - \$13,850
- Married filing jointly or qualifying widow(er) - \$27,700
- Head of household - \$20,800

..... 1. 13,850

2. Can you (or your spouse if married, filing jointly) be claimed as a dependent?

- ☒ **No.** Skip line 3; enter the amount from line 1 on line 4.
☐ **Yes.** Go to line 3.

3. Is your **earned income** more than \$850?

- ☐ **Yes.** Add \$400 to your earned income. Enter the total.
☐ **No.** Enter \$1,250

3.

4. Enter the **smaller** of line 1 or line 3. If under 65 and not blind, continue to line 6. **Otherwise**, go to line 5. 4. 13,850

5. Check if: ☒ **You** were 65 or older, ☐ **Blind**; ☐ **Spouse** was 65 or older, ☐ **Blind**. **Total boxes checked** 1
 If 65 or older or blind, multiply \$1,500 (\$1,850 if single or head of household) by the number in the box above 5. 1,850

6. Add lines 4 and 5. Enter the total here and on Form 1040 or 1040-SR, line 12 6. 15,700**Dependent Modified Adjusted Gross Income Worksheet**

1. Are you required to file a tax return?

- ☐ **No.** Do not include Dependent's modified adjusted gross income in Claiming Taxpayer's household income.
☐ **Yes.** Include Modified Adjusted Gross Income in claiming taxpayer's household income.

2. **Adjusted Gross Income.** Enter the amount from Form 1040, Line 11 2.

3. Enter tax-exempt interest from Form 1040, line 2a 3.

4. Enter any amounts from your Form 2555, lines 45 and 50 4.

5. **Subtotal.** Combine lines 2 through 4 5.

6. Enter the total Social Security benefits from Form 1040, line 6a 6.

7. Enter the taxable Social Security benefits from Form 1040, line 6b 7.

8. Nontaxable Social Security benefits. Subtract line 7 from line 6 8.

9. **Dependent Modified Adjusted Gross Income for Claiming Taxpayer's Form 8962.**

Add lines 5 and 8 9.

Form **1116****Foreign Tax Credit Worksheet****2023**

Name

Taxpayer Identification Number

Anne Gannon

If you have qualified dividends or capital gains, you may be required to use the worksheet on this page to make adjustments to those qualified dividends and gains before taking them into account on line 18. If you qualify for the adjustment exception as detailed in the Form 1116 instructions, no adjustment is necessary. If you figured your tax using the **Qualified Dividends and Capital Gain Tax Worksheet**, complete the worksheet as follows: Skip lines 2 through 5. On line 6, enter the amount from line 22 of the **Qualified Dividends and Capital Gain Tax Worksheet**. Complete all other lines as instructed on the worksheet.

Worksheet for Form 1116, Page 2, Line 18

1. Enter the amount from Form 1040, Form 1040-SR or Form 1040NR, line 15 1. 211,722
2. Enter your worldwide 28% gains (see instructions) 2. _____
3. Multiply line 2 by .2432 3. _____
4. Enter your worldwide 25% gains (see instructions) 4. _____
5. Multiply line 4 by .3243 5. _____
6. Enter your worldwide 20% gains and qualified dividends
(see instructions) 6. _____
7. Multiply line 6 by .4595 7. _____
8. Enter your worldwide 15% gains and qualified dividends
(see instructions) 8. 1,672
9. Multiply line 8 by .5946 9. 994
10. Enter your worldwide 0% gains and qualified dividends
(see instructions) 10. _____
11. Add lines 3, 5, 7, 9 and 10 11. 994
12. Subtract line 11 from line 1. Enter the result here and on Form 1116, line 18 12. 210,728

Please refer to the Form 6251 instructions for the alternative minimum tax amounts reported on this worksheet

Worksheet for AMT Form 1116, Page 2, Line 18

1. Enter the amount from Form 6251, line 4 1. 227,422
2. Enter the amount from Form 6251, line 36 2. _____
3. Multiply line 2 by .1071 3. _____
4. Enter the amount from Form 6251, line 33 4. _____
5. Multiply line 4 by .2857 5. _____
6. Enter the amount from Form 6251, line 30 6. 1,672
7. Multiply line 6 by .4643 7. 776
8. Enter the amount from Form 6251, line 23 8. _____
9. Add lines 3, 5, 7 and 8 9. 776
10. Subtract line 9 from line 1. Enter the result here and on the AMT Form 1116, line 18 10. 226,646

Form **1040****Foreign Tax Credit Carryover Worksheet****2023**

Name

Anne Gannon

Taxpayer Identification Number

Foreign Income Category Passive Income**Regular**

	Foreign Taxes Available	Maximum Credit Allowable	Unused (+) or Excess (-)	Carryback Applied from CY	Carryforward Applied to CY	* CY Unused (+) or Excess (-)
2013						
2014						
2015						
2016						
2017						
2018						
2019						
2020						
2021						
2022						
2023	10	21	-11			-11

* Amounts flow to the Foreign Tax Credit Carryover Report

Alternative Minimum Tax

	Foreign Taxes Available	Maximum Credit Allowable	Unused (+) or Excess (-)	Carryback Applied from CY	Carryforward Applied to CY	* CY Unused (+) or Excess (-)
2013						
2014						
2015						
2016						
2017						
2018						
2019						
2020						
2021						
2022						
2023	10	23	-13			-13

* Amounts flow to the Foreign Tax Credit Carryover Report

Form **1040**

K-1 Reconciliation Worksheet - Sch E, B, D, Form 4797

2023

Name **Anne Gannon**

Taxpayer Identification Number

Entity Name **ENTERPRISE PRODUCTS PARTNERS, L.P.**

EIN **76-0568219**

Entity Type

Partnership

Screen **K1**

K1 Unit **1**

Activity

Passive Activity Type

Publicly Traded

Entire disposition of activity **X**

Schedule E page 2	Current Year Amount	PY Suspended Basis Loss	Disallowed Basis Limitation	PY Suspended At-risk Loss	Disallowed At-risk Limitation	PY Suspended Passive Loss	Disallowed Loss Limitation	Tax Return
Ordinary business income/-loss	-11							
Net rental real estate income/-loss								
Other net rental income/-loss								
Guaranteed payments								
Section 179 expense								
Disallowed Section 179 expense								
Depletion								
Section 59(e)(2) expenditures								
Preproductive period expense								
Reforestation expense deduct								
Other deductions								
Unreimbursed expenses								
Other inc/loss - Schedule E								
Debt financed acquisition								
Dependent care benefits								
Total Schedule E page 2	-11							-11
Schedule E page 1								
Royalties								
Deductions-royalty income								
Depletion								
Total Schedule E page 1								
Schedule B								
Interest Income								
Tax-exempt interest income								
Dividend Income								
Qualified dividends (1040, Page 2)								
Schedule D89496781								
Short-term capital gain/-loss								
Long-term capital gain/-loss								
28% capital gain/-loss								
1256 contracts and straddles								
Form 4797								
4797 Part I								
4797 Part II								
Section 179/280F recapture								

Name **Anne Gannon**

Taxpayer Identification Number

Entity Name	ENTERPRISE PRODUCTS PARTNERS, L.P. EIN 76-0568219	Entity Type	Partnership
-------------	---	-------------	-------------

Screen	K1	K1 Unit	I

Activity	Publicly Traded	Entire disposition of activity
Passive Activity Type		X

[illegible]

Form **1040****PTP - Passive Activity Deduction Worksheet****2023**

Name

Anne Gannon

Taxpayer Identification Number

Form **K1** Unit **1**Activity **ENTERPRISE PRODUCTS PARTNERS, L.P.**Entire Disposition of Activity **X****Regular Tax Loss Calculations**

	Prior Year Suspended Losses	Current Year Generated	Current Year Utilized	Suspended Losses To Next Year
Operating		11	11	
Short-term capital loss				
Long-term capital loss				
28% rate capital loss				
Section 1231 loss				
Ordinary business loss				
Other Losses - 1040 Schedule 1				

Alternative Minimum Tax Loss Calculations

	Prior Year Suspended Losses	Current Year Generated	Current Year Utilized	Suspended Losses To Next Year
Operating		11	11	
Short-term capital loss				
Long-term capital loss				
28% rate capital loss				
Section 1231 loss				
Ordinary business loss				
Other Losses - 1040 Schedule 1				

Client Copy

K-1 Reconciliation Worksheet - Qualified Business Income

2023

Schedule E

Name Anne Gannon

Taxpayer Identification Number

Entity Name ENTERPRISE PRODUCTS PARTNERS, L.P.

EIN 76-0568219

Entity Type Partnership

Screen K1 K1 Unit 1

Activity Passive Activity Type Publicly Traded

Entire disposition of activity X

Qualified Business Income	Screen K1QBI Amount	QBI Items from Schedule K-1	Basis Limit Adjustment	At-risk Limit Adjustment	Passive Limitation	Qualified Business Income	Prior Year Suspended QBI Losses Allowed		
							Passive / 179	Basis	At-risk
Ordinary business inc./loss	-11					-11			
Net rental real estate inc./loss									
Other net rental income/loss									
Royalties									
Section 1231 gain (loss)									
Section 179 expense									
Disallowed Section 179 exp									
Other income (loss)									
Other income/loss Form 1040									
Reserved									
Other deductions									
4797 ordinary income / -loss									
Depletion									
UPE + Debt financed acqisiti									
Deductible part of SE tax									
Self-employed health insurance									
Self-employed qualified plans									
Ordinary gains on distribution									
Total Qualified Business Income						-11			

Form 8995 or 8995-A

Qualified business net (loss) carryforward from prior years
Form 8995, line 3 or Form 8995-A (Schedule C), line 2

Suspended Loss Carryforwards	Pre -TCJA Passive	Post- TCJA Passive	Pre -TCJA Basis	Post -TCJA Basis	Pre -TCJA At-Risk	Post-TCJA At-Risk	Other carryovers
Ordinary business loss							
Net rental real estate loss							
Other net rental loss							
Section 179 expense							
Depletion							
Section 59(e)(2) expenditure							
Preproductive period exp							
Reforestation expense ded							
Other deductions							
Other losses - Schedule E							
Dependent care expense							
4797 - Ordinary loss							
Other losses - 1040 Sch 1							
Section 1231 loss							

Form **1040****Social Security Worksheet****2023**

Name

Taxpayer Identification Number

Anne GannonIf you are married filing separately and you **lived apart** from your spouse for all of 2023:

- Form 1040/1040-SR: Enter "D" to the right of the word "benefits" on line 6a.

1. Enter the total amount from box 5 of all your Forms SSA-1099 and Forms RRB-1099 (if applicable) Also, enter this amount on Form 1040 or 1040-SR, line 6a. Tp: Sp:	1. <u>46,416</u>
2. Multiply line 1 by 50% (0.50).	2. <u>23,208</u>
3. Add the amounts on Form 1040 or 1040-SR, lines 1z, 2a, 2b, 3b, 4b, 5b, 7, and Schedule 1, line 10. Also, enter the total of any exclusion/adjustments for Qualified U.S. savings bond interest (Form 8815, line 14), adoption benefits (Form 8839, line 28), foreign earned income or housing (Form 2555, lines 45 and 50), certain income of bona fide residents of American Samoa (Form 4563, line 15) or Puerto Rico	3. <u>187,995</u>
4. Add lines 2 and 3	4. <u>211,203</u>
5. Enter the total of the amounts from Form 1040 or 1040-SR, Schedule 1, lines 11 through 20, 23, and 25.	5.
6. Subtract line 5 from line 4	6. <u>211,203</u>
7. Enter \$25,000 (\$32,000 if married filing jointly; \$0 if married filing separately and you lived with your spouse at any time during 2023)	7. <u>25,000</u>
8. Subtract line 7 from line 6. If zero or less, enter -0- - If line 8 is zero, stop here. None of your benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b. If you are married filing separately and you lived apart from your spouse for all of 2023, enter -0- on Form 1040 or 1040-SR, line 6b. - If line 8 is more than zero, go to line 9.	8. <u>186,203</u>
9. Enter \$9,000 (\$12,000 if married filing jointly; \$0 if married filing separately and you lived with your spouse at any time during 2023)	9. <u>9,000</u>
10. Subtract line 9 from line 8. If zero or less, enter -0-	10. <u>177,203</u>
11. Enter the smaller of line 8 or line 9	11. <u>9,000</u>
12. Enter one half of line 11	12. <u>4,500</u>
13. Enter the smaller of line 2 or line 12	13. <u>4,500</u>
14. Multiply line 10 by 85% (0.85). If line 10 is zero, enter -0-	14. <u>150,623</u>
15. Add lines 13 and 14	15. <u>155,123</u>
16. Multiply line 1 by 85% (0.85)	16. <u>39,454</u>
17. Taxable benefits. Enter the smaller of line 15 or line 16. Also, enter this amount on Form 1040 or 1040-SR, line 6b.	17. <u>39,454</u>
Percentage of total benefits received included as taxable income.	<u>85.0 %</u>

Note: If part of your benefits are taxable for 2023 **and** they include benefits paid in 2023 that were for an earlier year, you may be able to reduce the taxable amount shown on the worksheet. See Pub. 915 for details.

Federal Statements**Form 1040, Dividend Income**

<u>Payer</u>	<u>Ordinary Dividends</u>	<u>Qualified Dividends</u>	<u>Section 199A Dividends</u>
RAYMOND JAMES & ASSOCIATES, INC. VJ674	\$ 171	\$ 171	\$
RAYMOND JAMES & ASSOCIATES, INC. 3C674	3,090	1,501	146
Total	\$ 3,261	\$ 1,672	\$ 146

Form 1040, Line 7 - Capital Gain Distributions

<u>Payer</u>	<u>Capital Gain Distribution</u>
RAYMOND JAMES & ASSOCIATES, INC. 3C674	\$ 31
Total	\$ 31

Form 1040, Line 26 - Estimated Tax Payments and Amount Applied From Previous Year

<u>Description</u>	<u>Amount</u>
2022 overpayment applied	\$ 2,074
Total	\$ 2,074

Federal Statements

RAYMOND JAMES & ASSOCIATES, INC. [C

Form 1116 line 1a - Gross Income From Sources Within Country

Description	A	B	C
Foreign qualified dividends	\$	\$	\$
Foreign qualified divs taxed at 15%	204		
x adjustment factor (0.4054)	83		
Other foreign gross income			
1116 Foreign Gross Income	231		
- 1116 Foreign Qualified Dividends	204		
	27		
Total	110		

RAYMOND JAMES & ASSOCIATES, INC. [C

Form 1116 line 3e - Gross Income from All Sources

Description	Amount
1040 ln 1/2b-5b Sch 1 ln 1/2a/7/8	\$ 230,400
Gross Sch D capital gains	1,409
Total	\$ 232,869

Federal Statements

Form 8995-A, Line 28 - Qualified Publicly Traded Partnership Income or (Loss) included in Line 28

Description	Amount
ENTERPRISE PRODUCTS PARTNERS, L.P.	\$ -11
Total	\$ -11

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Federal Statements**Form 1040 Reconciliation Worksheet, Line 61 - Other Taxes**

Description	Amount
Form 8959	\$ 45
Form 8960	154
Total	\$ 199

Client Copy

Federal Statements

TAX COLLECTOR PBC

Form W-2, Box 12

Description	Amount
Cost of group term life insurance coverage over 50,000	\$ 433
Section 457(b) contributions	30,000
Cost of employer-sponsored health coverage	13,329
Total	\$ <u>43,762</u>

TAX COLLECTOR PBC

Form W-2, Box 14 - Other

Description	Amount
FRS 414 (H)	\$ 5,958
Total	\$ <u>5,958</u>

Client Copy

Form **1040****Carryover Report****2023**

Name

Anne Gannon

Taxpayer Identification Number

Carryover Item	Available to 2023	2023 Amounts		Carryover to 2024
Minimum tax credit				
Investment interest				
Investment interest - AMT				
Short-term capital loss		Generated	2,571	2,571
Short-term capital loss - AMT		Generated	2,571	2,571
Long-term capital loss		Generated	122	122
Long-term capital loss - AMT		Generated	122	122
Residential energy efficient property				
D.C. first-time homebuyer credit				
Tax credit bonds				
Qualified business income loss				
Qualified REIT income and PTP loss				
Excess business loss portion of NOL				

Nonrecaptured Section 1231 Losses - Line 8, Form 4797		AMT Nonrecaptured Section 1231 Losses - Line 8, Form 4797	
2018 Amounts		2018 Amounts	
2019 Amounts		2019 Amounts	
2020 Amounts		2020 Amounts	
2021 Amounts		2021 Amounts	
2022 Amounts		2022 Amounts	
Available to 2023		Available to 2023	
2023 Amounts		2023 Amounts	
Carryover to 2024		Carryover to 2024	

Form **1040**

IRA Distribution Report

2023

Name

Taxpayer Identification Number

Anne Gannon

T/S	Payer	Box 7 Gross Distribution Code	1099-R Box 1	Taxable Amount 1099-R Box 2a (less rollover amount)	Qualified Charitable Distribution
A	RAYMOND JAMES TRUST COMPANY OF NEW	7	2,069	2,069	
B					
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					
M					
N					
O					
			2,069	2,069	
	Taxpayer				
	Spouse				
	Total		2,069	2,069	

	Amount Of Rollover	Federal Withholding	State Withholding	Local Withholding	Traditional IRA Converted to Roth IRA	Original Conversion or Recaracterization	Qualified Roth IRA Distribution
A		414					
B							
C							
D							
E							
F							
G							
H							
I							
J							
K							
L							
M							
N							
O							
Tp		414					
Sp							
Total		414					

Form **1040**

Pension/Annuity Report

2023

Name
Anne Gannon

Taxpayer Identification Number

T/S		Payer	Box 7 Code	Gross Distribution	Rollover	Taxable Amount
A	—	BNY MELLON DISBURSEMENT AGENT DOLE	7	6,129	—	6,129
B	—	STATE STREET RETIREE SERVICES FOR U	4	1,016	—	1,016
C	—	VOYA RETIREMENT INSURANCE & ANNUITY	7	5,717	—	5,717
D	—		—		—	
E	—		—		—	
F	—		—		—	
G	—		—		—	
H	—		—		—	
I	—		—		—	
J	—		—		—	
K	—		—		—	
L	—		—		—	
M	—		—		—	
N	—		—		—	
O	—		—		—	
Taxpayer				12,862	—	12,862
Spouse						
Total				12,862		12,862

NIIT		Capital Gain Distribution	Public Safety Officer Exclusion	Federal Withholding	State Withholding	Local Withholding
A	—					
B	—					
C	—			1,830		
D	—					
E	—					
F	—					
G	—					
H	—					
I	—					
J	—					
K	—					
L	—					
M	—					
N	—					
O	—					
Taxpayer				1,830		
Spouse						
Total				1,830		

Form **1040**

Salaries & Wages Report

2023

Name
Anne Gannon

Taxpayer Identification Number
[REDACTED]

T/S	Employer	Federal Wages	Federal Withheld	Soc Sec Wages
A	TAX COLLECTOR PBC	169,005	42,630	160,200
B				
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
M				
Taxpayer Spouse Totals		169,005	42,630	160,200

	Soc Sec Withheld	Medicare Wages	Medicare Withheld	Soc Sec Tips	Allocated Tips	Dep Care Ben	Other, Box 14
A	9,932	204,963	3,017				5,958
B							
C							
D							
E							
F							
G							
H							
I							
J							
K							
L							
M							
Taxpayer Spouse Totals		9,932	204,963	3,017			5,958

	State	State Wages	State Withheld	Name of Locality	Local Wages	Local Withheld
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
Taxpayer Spouse Totals						

Form **1040**

Withholding (WH) Summary Report

2023

Name _____

Taxpayer Identification Number

Anne Gannon

[illegible]

	Federal Withholding Amounts by Forms			State Withholding Amounts by Forms		
	Taxpayer	Spouse	Federal Total	Taxpayer	Spouse	State Total
Form(s) W2	42,630		42,630			
Form(s) 1099	12,455		12,455			
Other forms	45		45			
Form(s) 8805*						
Form(s) 8288-A*						
Form(s) 1042-S*						
Total	55,130		55,130			

*1040/SR included with other forms

Form **1040****Reconciliation Worksheet - Taxable Income & Tax****2023**

Name

Anne Gannon

Taxpayer Identification Number

Tax brackets are rates applied to specific levels of taxable income. Various rates apply to different portions of the total taxable income. Type of income, further determines the rate applied. Marginal Tax Rate is the tax paid on the highest level of taxable income. This worksheet details how tax is calculated on ordinary income and capital gain income, the percentage of taxable income, marginal tax rate and the tax method used.

Filing Status **Single**Tax Pct Total Tax (ln 27) divided Total Taxable Income (ln 19) **22.0 %**Tax Method **Qualified Dividends & Capital Gain Tax Worksheet**

Tax using ordinary and capital gains rates exceeds tax using only ordinary rates. Taxable income is taxed only using ordinary rates:

Tax using capital gains rates

Tax using Ordinary rates

Tax savings

	Taxable Amount	Marginal Tax Rate	Tax on Taxable Income	Marginal Tax Rate - Income Range	Amount of Income to Next Tax Bracket
Ordinary Income	210,050	32.0 %	46,048	\$182,100 - \$231,250	21,200
Capital Income	1,672	15.0 %	251	\$44,725 - \$578,125	576,453
Capital Income - 1250		%			
Capital Income - 1202		%			

*Tax on taxable ordinary income under \$100,000 is determined using IRS Tax Tables that impose the same amount of tax on taxable income within \$50 intervals. Therefore, the column (b) Tax may not be calculated as column (a) times the applicable line tax rate.

Income taxed at ordinary rates

	(a) Taxable Income	(b) Tax*
1. 10% rate Maximum taxable income per this bracket: \$11,000	1a. 11,000	1b. 1,103
2. 12% rate Maximum taxable income per this bracket: \$33,725	2a. 33,725	2b. 4,044
3. 22% rate Maximum taxable income per this bracket: \$50,650	3a. 50,650	3b. 11,143
4. 24% rate Maximum taxable income per this bracket: \$86,725	4a. 86,725	4b. 20,814
5. 32% rate Maximum taxable income per this bracket: \$49,150	5a. 27,950	5b. 8,944
6. 35% rate	6a.	6b.
7. 37% rate	7a.	7b.
8. Total ordinary taxable income and ordinary tax. Add lines 1 through 7	8a. 210,050	8b. 46,048

Income taxed at capital gains rates

9. 0% capital gains rate	9a.	9b.
10. 15% capital gains rate Maximum taxable income per this bracket: \$447,675	10a. 1,672	10b. 251
11. 20% capital gains rate	11a.	11b.
12. 25% capital gains rate Unrecaptured Section 1250 Gain	12a.	12b.
13. 28% capital gains rate Small business stock, collectibles	13a.	13b.
14. Total taxable capital gains and capital gains tax. Add lines 9 through 13	14a. 1,672	14b. 251

Total taxable income

15. Total ordinary taxable income. Enter the amount from line 8a.	15. 210,050
16. Total capital gains taxable income. Enter the amount from line 14a.	16. 1,672
17. Add lines 15 and 16.	17. 211,722
18. Enter the net foreign exclusion amount from the Foreign Earned Income Tax Worksheet, line 2c.	18.
19. Taxable income reported on 1040/1040SR, line 15, (1040NR, line 15). Subtract line 18 from line 17.	19. 211,722

Total tax

20. Total ordinary tax. Enter the amount from line 8b.	20. 46,048
21. Total capital gains tax. Enter the amount from line 14b.	21. 251
22. Tax on child's interest and dividend.	22.
23. Tax on lump-sum distribution.	23.
24. Other taxes.	24.
25. Add lines 20 through 24.	25. 46,299
26. Enter the tax allocated to the net exclusion amount from the Foreign Earned Income Tax Worksheet, line 5.	26.
27. Total tax reported on 1040/1040SR, line 16, (1040NR, line 16). Subtract line 26 from line 25.	27. 46,299