

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/11/2024

General Information

Name: Hon Stephen Anthony Pitre

CONFIDENTIAL

PID 37329

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (1St)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2023 was \$ 5,649,199.04.

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 \$ 700,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Northwestern Mutual Life Ins.	\$ 105,696.80
Synovus bank account	\$ 13,109.00

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Description of Asset	Value of Asset
FLORIDA 457B AMFS EMRG MKT BD R6 AMFS NEW WLD R6 DDGECOC INX I FIX CONTRA K6 FIXED ASSETS JPM MDCAP VAL R6 SMCAP VAL EQ D TROE PR DIVID GR 1 AND EDINC B AND GR STK B AND OVSEAR STK I AND SPCTRM INC I AND US MDCAP GR EQ D VANGUARD INST INDS INST LS AND REAL	\$ 111,239.18
{REDACTED}	\$ 1,019,955.00
{REDACTED}	\$ 30,000.00
SPDR GOLD SHARES ETF	\$ 7,646.80
ISHARES CORE S&P 500 ETF	\$ 66,868.20
ISHARES RUSSELL 2000 ETF	\$ 42,628.86
ISHARES MSCI EAFE SMALL CAP ETF	\$ 20,887.85
VANGUARD FTSE ALL WORLD EX US ETF	\$ 32,151.31
BLACKROCK COMMODITY STRATEGIES INSTL	\$ 7,243.16
VOYA INTERMEDIATE BOND I	\$ 34,329.70
PGIM TOTAL RETURN BOND Z	\$ 22,026.94
SCHWAB VALUE ADVANTAGE MONEY INV	\$ 6,399.50
APPLE INC	\$ 639,199.60
AMN HEALTHCARE SRVCS	\$ 2,396.16
BRISTOL-MYERS SQUIBB	\$ 102,620.00
CATERPILLAR INC	\$ 29,567.00
CONOCOPHILLIPS	\$ 139,284.00
CHEVRON CORP	\$ 164,076.00
HOME DEPOT INC	\$ 155,947.50
IBM CORP	\$ 114,485.00
JOHNSON & JOHNSON	\$ 282,132.00
MCDONALDS CORP	\$ 163,080.50
MERCK & CO. INC.	\$ 119,376.90
ORGANON & CO	\$ 1,571.78
PROCTER & GAMBLE	\$ 61,693.34
RYDER SYSTEM INC	\$ 80,542.00

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Description of Asset	Value of Asset
SUN LIFE FINL F	\$ 31,116.00
US LIME&M	\$ 46,070.00
WALMART INC	\$ 157,650.00
XEROX HOLDINGS CORP	\$ 4,124.25
ZIMMER BIOMET HLDGS	\$ 38,700.60
ISHARES MSCI EMERGING MKT ETF IV	\$ 33,855.51
SCHWAB FUNDAMENTAL INTL SMAL COM ETF	\$ 122,010.00
ISHARES RUSSELL 2000 ETF	\$ 194,430.51
VANGUARD FTSE ALL WORLD EX US ETF	\$ 95,438.00
PARNASSUS CORE EQUITY INSTITUTIONAL	\$ 81,108.91
TCW GLOBAL REAL ESTATE I	\$ 21,763.99
PIMCO RAE US SMALL INSTL	\$ 37,280.88
VANGUARD INTERNATIONAL GROWTH ADM	\$ 70,771.39
VANGUARD INFLATION-PROTECTED SECS ADM	\$ 9,681.86
VICTOR INCOME INSTIT	\$ 45,545.58
AVANTIS US SMALL CAP V	\$ 30,283.94
BOSTON TRUST WALDEN SMALL	\$ 11,764.18
FEDERATE HERME INTL SM	\$ 30,871.82
HARBOR INTERNATIONAL COR	\$ 25,095.65
JPMORGAN EMERGING MARKET	\$ 43,933.98
VANGUARD EQUITY INCOME A VEIRX	\$ 30,202.68
BAIRD CORE BOND INS	\$ 15,256.22
DODGE & CO INCOME I	\$ 15,272.21
T ROEW PRICE EMERGING M	\$ 3,859.53
VICTORY INCOME INSTIT	\$ 16,647.27
AVANTIS US SMALL CAP V	\$ 39,553.81
DWS ENHANCED COMMIODDITY S	\$ 4,797.47
FEDERATED HERMES INTL SM	\$ 29,728.37
HARBOR INTL COR	\$ 20,156.22

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Description of Asset	Value of Asset
PARNASSUS CORE EQUITY IN	\$ 84,821.68
PIMCO RAE US SMALL INSTL	\$ 15,751.39
TCW GLOBAL REAL ESTATE	\$ 13,589.34
VANGUARD EMERGIUNG MKTS SEL	\$ 21,418.62
VANGUARD INTL G	\$ 42,730.07
FLORIDA PENSION PLAN BUT UNKNOWN VALUE BUT OVER 15,000	\$ 15,000.00
MORGAN STANLEY CD	\$ 75,180.00
CD MORGAN STANLY	\$ 101,044.00
UBS BANK CD	\$ 75,533.25
WELLS FARGO MTN	\$ 50,601.00
CASH RAYMOND JAMES	\$ 4,009.34
INVESCO STIT TREASURY	\$ 49,869.76

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
SYNOVUS MORTGAGE	800 SHADES CREEK PARKWAY, MS 130, BIRMINGHAM, AL 35209	\$ 483,477.31

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

Income

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2023 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

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

PRIMARY SOURCES OF INCOME:

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

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

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

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

N/A

Training

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

Signature of Reporting Official or Candidate

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

Stephen Anthony Pitre

Digitally signed: 06/11/2024

Filed with COE: 06/11/2024

2023 Individual Return
prepared for:

STEPHEN A. and [REDACTED] PITRE
P O BOX 607
GULF BREEZE, FL 32562

Angela J. Parker, CPA, APAC
1997 Surgi Dr
Mandeville, LA 70448

2023

OMB No. 1545-0074

IRS Use Only — Do not write or staple in this space.

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

Your first name and middle initial

STEPHEN A. PITRE

Last name

See separate instructions.

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

PITRE

Last name

Your social security number

Spouse's social security number

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

P O BOX 607

Apt. no.

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

GULF BREEZE, FL 32562

State

ZIP code

Foreign country name

Foreign province/state/county

Foreign postal code

Presidential Election Campaign

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

☐ You ☐ Spouse**Filing Status**

Check only one box.

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

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

Digital Assets

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)

☐ Yes ☒ No**Standard Deduction**

Someone can claim:

☐ You as a dependent☐ Spouse itemizes on a separate return or you were a dual-status alien☐ Your spouse as a dependent**Age/Blindness**You: ☐ Were born before January 2, 1959☐ Are blindSpouse: ☐ Was born before January 2, 1959☐ Is blind**Dependents** (see instructions):

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

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.

Attach Sched. B if required.

1a	Total amount from Form(s) W-2, box 1 (see instructions)	174,112.
1b	Household employee wages not reported on Form(s) W-2	
1c	Tip income not reported on line 1a (see instructions)	
1d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	
1e	Taxable dependent care benefits from Form 2441, line 26	
1f	Employer-provided adoption benefits from Form 8839, line 29	
1g	Wages from Form 8919, line 6	
1h	Other earned income (see instructions)	
1i	Nontaxable combat pay election (see instructions)	
1z	Add lines 1a through 1h	174,112.
2a	Tax-exempt interest	420.
2b	Taxable interest	708.
3a	Qualified dividends	61,137.
3b	Ordinary dividends	66,358.
4a	IRA distributions	
4b	Taxable amount	
5a	Pensions and annuities	
5b	Taxable amount	
6a	Social security benefits	
6b	Taxable amount	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐	113,451.
8	Additional income from Schedule 1, line 10	8,130.
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	362,759.
10	Adjustments to income from Schedule 1, line 26	
11	Subtract line 10 from line 9. This is your adjusted gross income	362,759.
12	Standard deduction or itemized deductions (from Schedule A)	27,700.
13	Qualified business income deduction from Form 8995 or Form 8995-A	52.
14	Add lines 12 and 13	27,752.
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	335,007.

Standard Deduction for —

- Single or Married filing separately, \$13,850
- Married filing jointly or Qualifying surviving spouse, \$27,700
- Head of household, \$20,800
- If you checked any box under **Standard Deduction**, see instructions.

Tax and Credits

16 Tax (see instructions). Check if any from Form(s): 1 ☐ 8814
2 ☐ 4972 3 ☐

16	Amount from Schedule 2, line 3	52,095.
17	Add lines 16 and 17	
18	Child tax credit or credit for other dependents from Schedule 8812	52,095.
19	Amount from Schedule 3, line 8	4,500.
20	Add lines 19 and 20	1,369.
21	Subtract line 21 from line 18. If zero or less, enter -0-	5,869.
22	Other taxes, including self-employment tax, from Schedule 2, line 21	46,226.
23	Add lines 22 and 23. This is your total tax	4,285.
24		50,511.

Payments

25 Federal income tax withheld from:
a Form(s) W-2 25a 20,934.
b Form(s) 1099 25b
c Other forms (see instructions) 25c
d Add lines 25a through 25c 25d 20,934.

26 2023 estimated tax payments and amount applied from 2022 return 26 20,840.

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 41,774.

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

Refund

34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid** 34
35a Amount of line 34 you want **refunded to you**. If Form 8888 is attached, check here ☐ 35a
b Routing number c Type: ☐ Checking ☐ Savings
d Account number

36 Amount of line 34 you want **applied to your 2024 estimated tax** 36

Direct deposit?
See instructions.

Amount You Owe

37 Subtract line 33 from line 24. This is the **amount you owe**.
For details on how to pay, go to www.irs.gov/Payments or see instructions. 37 8,737.

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 **ANGELA P. KANGAS** Phone no. **985-624-8583** Personal identification number (PIN) [REDACTED]

Sign Here

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

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
[Signature]		JUDICIAL	
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
		HOMEMAKER	
Phone no.	Email address		

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☒ Self-employed
ANGELA P. KANGAS	ANGELA P. KANGAS	7/19/2024	P00433092	
Firm's name	Firm's address			Phone no.
ANGELA J. PARKER, CPA, APAC	1997 SURGI DR			985-624-8583
	MANDEVILLE, LA 70448			Firm's EIN [REDACTED]

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

Form 1040 (2023)

SCHEDULE 1
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Income and Adjustments to Income

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment
Sequence No. 01

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

STEPHEN A. AND [REDACTED] PITRE

Your social security number
[REDACTED]

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions):		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	8,130.
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	8,130.

Part II Adjustments to Income

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

Schedule 1 (Form 1040) 2023

SCHEDULE 2
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Taxes

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment
Sequence No. **02**

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

STEPHEN A. AND [REDACTED] PITRE

Your social security number
[REDACTED]

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐	8	
9	Household employment taxes. Attach Schedule H	9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10	
11	Additional Medicare Tax. Attach Form 8959	11	
12	Net investment income tax. Attach Form 8960	12	4,285.
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2023

Part II Other Taxes (continued)

17	Other additional taxes:		
a	Recapture of other credits. List type, form number, and amount:		
b	Recapture of federal mortgage subsidy, if you sold your home see instructions.	17a	
c	Additional tax on HSA distributions. Attach Form 8889.	17b	
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889.	17c	
e	Additional tax on Archer MSA distributions. Attach Form 8853.	17d	
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853.	17e	
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property.	17f	
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A.	17g	
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A.	17h	
j	Section 72(m)(5) excess benefits tax.	17i	
k	Golden parachute payments.	17j	
l	Tax on accumulation distribution of trusts.	17k	
m	Excise tax on insider stock compensation from an expatriated corporation.	17l	
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866.	17m	
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR.	17n	
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund.	17o	
q	Any interest from Form 8621, line 24.	17p	
z	Any other taxes. List type and amount:	17q	
		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
			4,285.

Schedule 2 (Form 1040) 2023

SCHEDULE 3
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Credits and Payments

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment
Sequence No. 03

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

STEPHEN A. AND [REDACTED] PITRE

Your social security number

[REDACTED]

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	1,369.
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	1,369.

(continued on page 2)

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

Schedule 3 (Form 1040) 2023

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962.		9	
10	Amount paid with request for extension to file (see instructions).		10	
11	Excess social security and tier 1 RRTA tax withheld.		11	
12	Credit for federal tax on fuels. Attach Form 4136.		12	
13	Other payments or refundable credits:			
a	Form 2439.	13a		
b	Credit for repayment of amounts included in income from earlier years.	13b		
c	Elective payment election amount from Form 3800, Part III, line 6, column (i).	13c		
d	Deferred amount of net 965 tax liability (see instructions).	13d		
z	Other payments or refundable credits. List type and amount:	13z		
14	Total other payments or refundable credits. Add lines 13a through 13z.		14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31.		15	0.

Schedule 3 (Form 1040) 2023

SCHEDULE B
(Form 1040)

Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Interest and Ordinary Dividends

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

OMB No. 1545-0074

2023

Attachment
Sequence No. **08**

STEPHEN A. AND [REDACTED] PITRE

Your social security number
[REDACTED]

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:

RAYMOND JAMES - [REDACTED]
SUBTOTAL
ACCRUED INTEREST

Amount

717.
717.
-9.

- 2 Add the amounts on line 1.
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815.

- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b.
Note: If line 4 is over \$1,500, you must complete Part III.

708.

708.

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:

CHARLES SCHWAB - [REDACTED]
RAYMOND JAMES - [REDACTED]

Amount

65,206.
1,152.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b.
Note: If line 6 is over \$1,500, you must complete Part III.

66,358.

Part III

**Foreign
Accounts
and Trusts**

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

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

- 7a At any time during 2023, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions.
If 'Yes,' are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements.
b If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:
8 During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If 'Yes,' you may have to file Form 3520. See instructions.

Yes No

X

X

SCHEDULE D
(Form 1040)Department of the Treasury
Internal Revenue Service**Capital Gains and Losses**Attach to Form 1040, 1040-SR, or 1040-NR.
Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.
Go to www.irs.gov/ScheduleD for instructions and the latest information.

OMB No. 1545-0074

2023Attachment
Sequence No. **12**

Name(s) shown on return

STEPHEN A. AND [REDACTED] PITREYour social security number
[REDACTED]Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes ☒ No
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.**Part I Short-Term Capital Gains and Losses – Generally Assets Held One Year or Less** (see instructions)

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

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

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.....	51,490.	54,574.		-3,084.
1b Totals for all transactions reported on Form(s) 8949 with Box A checked.....				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked.....				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked.....				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824.....			4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1....			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions.....			6	()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back.....			7	-3,084.

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.....	88,437.	73,368.		15,069.
8b Totals for all transactions reported on Form(s) 8949 with Box D checked.....				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked.....	124,208.	22,742.		101,466.
10 Totals for all transactions reported on Form(s) 8949 with Box F checked.....				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824.....			11	
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1....			12	
13 Capital gain distributions. See the instrs.....			13	
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	116,535.

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	113,451.
• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.		
17 Are lines 15 and 16 both gains? ☒ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet.	18	0.
19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet.	19	
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: • The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500)	21	()
Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

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.

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

1	(a) Description of property (Example: 100 shares XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	CHARLES SCHWAB # [REDACTED] L-T VARIOUS		VARIOUS	124,208.	22,742.			101,466.
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).				124,208.	22,742.		0.	101,466.

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.

SCHEDULE E
(Form 1040)

Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

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

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

OMB No. 1545-0074

2023

Attachment
Sequence No. **13**

STEPHEN A. AND [REDACTED] PITRE

Your social security number [REDACTED]

Part I **Income or Loss From Rental Real Estate and Royalties**

Note: If you are in the business of renting personal property, use Schedule C. See instructions. If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

- A Did you make any payments in 2023 that would require you to file Form(s) 1099? See instructions. ☐ Yes ☒ No
- B If "Yes," did you or will you file required Form(s) 1099? ☐ Yes ☐ No

1 a Physical address of each property (street, city, state, ZIP code)

A 6601 LEO KERNER LAFITTE PARKWAY, MARRERO, LA 70072

B

C

1 b Type of Property
(from list below)

2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.

Fair Rental Days

Personal Use Days

QJV

A 5

B

C

A

B

C

Type of Property:

1 Single Family Residence

3 Vacation/Short-Term Rental

5 Land

7 Self-Rental

2 Multi-Family Residence

4 Commercial

6 Royalties

8 Other (describe)

Income:

Properties:

		A	B	C
3 Rents received	3	8,130.		
4 Royalties received	4			
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions	8			
9 Insurance	9			
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13			
14 Repairs	14			
15 Supplies	15			
16 Taxes	16			
17 Utilities	17			
18 Depreciation expense or depletion	18			
19 Other (list)	19			
20 Total expenses. Add lines 5 through 19	20			
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	8,130.		
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22			
23a Total of all amounts reported on line 3 for all rental properties	23a	8,130.		
b Total of all amounts reported on line 4 for all royalty properties	23b			
c Total of all amounts reported on line 12 for all properties	23c			
d Total of all amounts reported on line 18 for all properties	23d			
e Total of all amounts reported on line 20 for all properties	23e			
24 Income. Add positive amounts shown on line 21. Do not include any losses.	24	8,130.		
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here.	25			
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, and IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2	26	8,130.		

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

Schedule E (Form 1040) 2023

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

Your social security number

STEPHEN A. AND [REDACTED] PITRE

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	CROWN POINT CORPORATION	S		[REDACTED]		
B						
C						
D						

Passive Income and Loss**Nonpassive Income and Loss**

	(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss allowed (see Schedule K-1)	(j) Section 179 expense deduction from Form 4562	(k) Nonpassive income from Schedule K-1
A					
B					
C					
D					
29a Totals					
b Totals					
30 Add columns (h) and (k) of line 29a					30
31 Add columns (g), (i), and (j) of line 29b					31
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31					32

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer ID no.
A		
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	8,130.
42	Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120-S), box 17, code AN; and Schedule K-1 (Form 1041), box 14, code F. See instructions	42	
43	Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040, Form 1040-SR, or Form 1040-NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Foreign Tax Credit

(Individual, Estate, or Trust)

OMB No. 1545-0121

2023

Attachment
Sequence No. 19Department of the Treasury
Internal Revenue ServiceAttach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.
Go to www.irs.gov/Form1116 for instructions and the latest information.

Name

STEPHEN A. AND [REDACTED] PITRE

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

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) 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 columns A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession	VARIOUS			
1 a Gross income from sources within country shown above and of the type checked above (see instructions): SEE STATEMENT 2	9,525.			1 a 9,525.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions ☐				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement):				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction (see instructions):	27,700.			
b Other deductions (attach statement):				
c Add lines 3a and 3b	27,700.			
d Gross foreign source income (see instructions)	9,525.			
e Gross income from all sources (see instructions)	365,843.			
f Divide line 3d by line 3e (see instructions)	0.026036			
g Multiply line 3c by line 3f	721.			
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	721.			6 721.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 8,804.

Part II Foreign Taxes Paid or Accrued (see instructions)

C O U N T R Y	Credit is claimed for taxes (you must check one) (i) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued						(u) Total foreign taxes paid or accrued (add columns (q) through (t))				
		In foreign currency			In U.S. dollars							
		(j) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends		(r) Rents and royalties	(s) Interest	(t) Other foreign taxes paid or accrued	
A	12/31/2023						834.					834.
B												
C												

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2. 8 834.

BAA For Paperwork Reduction Act Notice, see instructions.

08/11/23

Form 1116 (2023)

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I.	9	834.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. If you enter an amount on line 10 and you don't need to attach Schedule B, check here (see instructions). SEE STMT 3 ☐ (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10	587.	
11	Add lines 9 and 10.	11	1,421.	
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		1,421.
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	8,804.	
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	8,804.	
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	335,007.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19		0.026280048
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions. 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		52,095.
21	Multiply line 20 by line 19 (maximum amount of credit).	21		1,369.
22	Increase in limitation (section 960(c)) (see instructions).	22		
23	Add lines 21 and 22.	23		1,369.
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		1,369.

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		1,369.
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		1,369.

Form 1116

ALTERNATIVE MINIMUM TAX

Foreign Tax Credit

(Individual, Estate, or Trust)

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

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

OMB No. 1545-0121

2023

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

Name

STEPHEN A. AND [REDACTED] PITRE

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

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

Part II Foreign Taxes Paid or Accrued (see instructions)

COUNTRY	Credit is claimed for taxes (you must check one) (j) ☒ Paid (k) ☐ Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:				Taxes withheld at source on:				
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends	(r) Rents and royalties	(s) Interest	(t) Other foreign taxes paid or accrued
A	12/31/2023					834.				834.
B										
C										

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

8

834.

BAA For Paperwork Reduction Act Notice, see instructions.

08/11/23

Form 1116 (2023)

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I.	9	834.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year. If you enter an amount on line 10 and you don't need to attach Schedule B, check here (see instructions). SEE STMT 5 ☐ (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10	1,006.	
11	Add lines 9 and 10.	11	1,840.	
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		1,840.
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		
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	8,804.	
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	362,707.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19		0.024273036
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16. See instructions. Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.	20		42,209.
21	Multiply line 20 by line 19 (maximum amount of credit).	21		1,025.
22	Increase in limitation (section 960(c)) (see instructions).	22		
23	Add lines 21 and 22.	23		1,025.
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		1,025.

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		1,025.
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		1,025.

SCHEDULE B
(Form 1116)

(Rev. December 2022)

Department of the Treasury
Internal Revenue Service

Foreign Tax Carryover Reconciliation Schedule

For calendar year 2023, or other tax year beginning , and ending

See separate instructions.

Attach to Form 1116.

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

OMB No. 1545-0121

Name

STEPHEN A. AND PITRE

Identifying number as shown
on page 1 of your tax return

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

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

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

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

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

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

01/10/23

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

Foreign Tax Carryover
Reconciliation (continued)

	(viii) Subtotal from page 1 (enter the amounts from column (vi) on page 1)	(ix) 4th Preceding Tax Year	(x) 3rd Preceding Tax Year	(xi) 2nd Preceding Tax Year	(xii) 1st Preceding Tax Year	(xiii) Current Tax Year	(xiv) Totals (add columns (viii) through (xiii))
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))				587.			587.
2 Adjustments to line 1 (enter description—see instructions):							
a Carryback adjustment (see instr.)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2). Include the column (xiv) total on the current year Form 1116, Part III, line 10.				587.			587.
4 Foreign tax carryover used in current tax year (enter as a negative number)				-535.			-535.
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.				52.			52.

BAA

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

SCHEDULE B
(Form 1116)

(Rev. December 2022)

Department of the Treasury
Internal Revenue Service

Foreign Tax Carryover Reconciliation Schedule

For calendar year 2023, or other tax year beginning

and ending

See separate instructions.

Attach to Form 1116.

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

OMB No. 1545-0121

Name

STEPHEN A. AND PITRE

ALTERNATIVE MINIMUM TAX

Identifying number as shown
on page 1 of your tax return

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

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

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

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

Foreign Tax Carryover
Reconciliation

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

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

01/10/23

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

ALTERNATIVE MINIMUM TAX

	(viii) Subtotal from page 1 (enter the amounts from column (viii) on page 1)	(ix) 4th Preceding Tax Year	(x) 3rd Preceding Tax Year	(xi) 2nd Preceding Tax Year	(xii) 1st Preceding Tax Year	(xiii) Current Tax Year	(xiv) Totals (add columns (viii) through (xiii))
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 8 of the prior year Schedule B (see instructions))							
2 Adjustments to line 1 (enter description—see instructions):							
a Carryback adjustment (see instr.)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2). Include the column (xiv) total on the current year Form 1116, Part III, line 10.							
4 Foreign tax carryover used in current tax year (enter as a negative number)							
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 5 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.							
				459.	356.		815.

BAA

SCHEDULE 8812
(Form 1040)

Department of the Treasury
Internal Revenue Service

**Credits for Qualifying Children
and Other Dependents**

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Schedule8812 for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment
Sequence No. **47**

Name(s) shown on return

STEPHEN A. AND [REDACTED] PITRE

Your social security number
[REDACTED]

Part I Child Tax Credit and Credit for Other Dependents

1 Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR		1	362,759.
2a	Enter income from Puerto Rico that you excluded	2a	
2b	Enter the amounts from lines 45 and 50 of your Form 2555	2b	
2c	Enter the amount from line 15 of your Form 4563	2c	
d Add lines 2a through 2c		2d	
3	Add lines 1 and 2d	3	362,759.
4	Number of qualifying children under age 17 with the required social security number	4	2
5	Multiply line 4 by \$2,000	5	4,000.
6	Number of other dependents, including any qualifying children who are not under age 17 or who do not have the required social security number	6	1
Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4.			
7	Multiply line 6 by \$500	7	500.
8	Add lines 5 and 7	8	4,500.
9	Enter the amount shown below for your filing status. • Married filing jointly—\$400,000 • All other filing statuses—\$200,000	9	400,000.
10	Subtract line 9 from line 3. • If zero or less, enter -0-. • If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc.	10	0.
11	Multiply line 10 by 5% (0.05)	11	
12	Is the amount on line 8 more than the amount on line 11? ☐ No. STOP. You cannot take the child tax credit, credit for other dependents, or additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. ☒ Yes. Subtract line 11 from line 8. Enter the result.	12	4,500.
13	Enter the amount from Credit Limit Worksheet A	13	50,726.
14	Enter the smaller of line 12 or line 13. This is your child tax credit and credit for other dependents. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.	14	4,500.

If the amount on line 12 is more than the amount on line 14, you may be able to take the **additional child tax credit** on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27 (also complete Schedule 3, line 11) before completing Part II-A.

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

Schedule 8812 (Form 1040) 2023

Part II-A Additional Child Tax Credit for All Filers**Caution:** If you file Form 2555, you cannot claim the additional child tax credit.

15 Check this box if you do not want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27. ☐		
16a Subtract line 14 from line 12. If zero, stop here ; you cannot take the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27.		16a 0.
b Number of qualifying children under 17 with the required social security number: _____ X \$1,600. Enter the result. If zero, stop here ; you cannot claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27.		16b
TIP: The number of children you use for this line is the same as the number of children you used for line 4.		17
17 Enter the smaller of line 16a or line 16b.		17
18a Earned income (see instructions).		18a
b Nontaxable combat pay (see instructions).		18b
19 Is the amount on line 18a more than \$2,500? ☐ No. Leave line 19 blank and enter -0- on line 20. ☐ Yes. Subtract \$2,500 from the amount on line 18a. Enter the result.		19
20 Multiply the amount on line 19 by 15% (0.15) and enter the result. Next. On line 16b, is the amount \$4,800 or more? ☐ No. If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the smaller of line 17 or line 20 on line 27. ☐ Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. Otherwise, go to line 21.		20

Part II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Residents of Puerto Rico

21 Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, or if you are a bona fide resident of Puerto Rico, see instructions.		21
22 Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13.		22
23 Add lines 21 and 22.		23
24 1040 and 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27, and Schedule 3 (Form 1040), line 11. 1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11.		24
25 Subtract line 24 from line 23. If zero or less, enter -0-.		25
26 Enter the larger of line 20 or line 25. Next, enter the smaller of line 17 or line 26 on line 27.		26

Part II-C Additional Child Tax Credit

27 This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28.	27 0.
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Schedule 8812 (Form 1040) 2023

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

OMB No. 1545-2294

2023Department of the Treasury
Internal Revenue ServiceAttach to your tax return.
Go to www.irs.gov/Form8995 for instructions and the latest information.Attachment
Sequence No. **55**

Name(s) shown on return

STEPHEN A. AND [REDACTED] PITRE

Your taxpayer identification number
[REDACTED]

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

Use this form if your taxable income, before your qualified business income deduction, is at or below \$182,100 (\$364,200 if married filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i	CROWN POINT CORPORATION	[REDACTED]	0.
ii			
iii			
iv			
v			

2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)	2	0.	5	0.
3	Qualified business net (loss) carryforward from the prior year	3	0.		
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-	4	0.		
5	Qualified business income component. Multiply line 4 by 20% (0.20)	5	0.		
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions)	6	259.	9	52.
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7	0.		
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0-	8	259.		
9	REIT and PTP component. Multiply line 8 by 20% (0.20)	9	52.		
10	Qualified business income deduction before the income limitation. Add lines 5 and 9	10	52.	14	32,094.
11	Taxable income before qualified business income deduction (see instructions)	11	335,059.		
12	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	12	174,588.		
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	160,471.		
14	Income limitation. Multiply line 13 by 20% (0.20)	14	32,094.	15	52.
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also enter this amount on the applicable line of your return (see instructions)	15	52.		
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-	16	0.		
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-	17	0.		

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

Form 8995 (2023)

Form **8867**

(Rev. November 2023)

Department of the Treasury
Internal Revenue Service

Taxpayer name(s) shown on return

STEPHEN A. AND [REDACTED] PITRE

Preparer's name

ANGELA P. KANGAS

Paid Preparer's Due Diligence Checklist

*Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC),
Child Tax Credit (CTC) (including the Additional Child Tax Credit (ACTC)) and
Credit for Other Dependents (ODC)), and Head of Household (HOH) Filing Status*

**To be completed by preparer and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.
Go to www.irs.gov/Form8867 for instructions and the latest information.**

OMB No. 1545-0074

For tax year

20 23Attachment
Sequence No. **70**

Taxpayer identification number

Preparer tax identification number

Part I Due Diligence Requirements

Please check the appropriate box for the credit(s) and/or HOH filing status claimed on the return and complete the related Parts I–V for the benefit(s) claimed (check all that apply).

☐ EIC ☒ CTC/ACTC/ODC ☐ AOTC ☐ HOH

	Yes	No	N/A
1 Did you complete the return based on information for the applicable tax year provided by the taxpayer or reasonably obtained by you?	☒	☐	
2 If credits are claimed on the return, did you complete the applicable EIC and/or CTC/ACTC/ODC worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, 1040-SS, or Schedule 8812 (Form 1040) instructions, and/or the AOTC worksheet found in the Form 8863 instructions, or your own worksheet(s) that provides the same information, and all related forms and schedules for each credit claimed?	☒	☐	☐
3 Did you satisfy the knowledge requirement? To meet the knowledge requirement, you must do both of the following.			
• Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's responses to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status.			
• Review information to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of any credit(s).	☒	☐	
4 Did any information provided by the taxpayer or a third party for use in preparing the return, or information reasonably known to you, appear to be incorrect, incomplete, or inconsistent? (If "Yes," answer questions 4a and 4b. If "No," go to question 5.)	☐	☒	
a Did you make reasonable inquiries to determine the correct, complete, and consistent information?	☐	☐	
b Did you contemporaneously document your inquiries? (Documentation should include the questions you asked, whom you asked, when you asked, the information that was provided, and the impact the information had on your preparation of the return.)	☐	☐	
5 Did you satisfy the record retention requirement? To meet the record retention requirement, you must keep a copy of your documentation referenced in question 4b, a copy of this Form 8867, a copy of any applicable worksheet(s), a record of how, when, and from whom the information used to prepare Form 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) provided by the taxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing status or to figure the amount(s) of the credit(s)	☒	☐	
List those documents provided by the taxpayer, if any, that you relied on:			
6 Did you ask the taxpayer whether he/she could provide documentation to substantiate eligibility for the credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return if his/her return is selected for audit?	☒	☐	
7 Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous year?	☒	☐	☐
(If credits were disallowed or reduced, go to question 7a; if not, go to question 8.)			
a Did you complete the required recertification Form 8862?	☐	☐	☐
8 If the taxpayer is reporting self-employment income, did you ask questions to prepare a complete and correct Schedule C (Form 1040)?	☐	☐	☒

BAA For Paperwork Reduction Act Notice, see separate instructions.

Form 8867 (Rev. 11-2023)

Part II Due Diligence Questions for Returns Claiming EIC (If the return does not claim EIC, go to Part III.)

	Yes	No	N/A
9a Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? (If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.)	☐	☐	☐
b Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer has supported the child the entire year?	☐	☐	☐
c Did you explain to the taxpayer the rules about claiming the EIC when a child is the qualifying child of more than one person (tiebreaker rules)?	☐	☐	☐

Part III Due Diligence Questions for Returns Claiming CTC/ACTC/ODC (If the return does not claim CTC, ACTC, or ODC, go to Part IV.)

	Yes	No	N/A
10 Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is a citizen, national, or resident of the United States?	☒	☐	☐
11 Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the child has not lived with the taxpayer for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child?	☒	☐	☐
12 Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return?	☒	☐	☐

Part IV Due Diligence Questions for Returns Claiming AOTC (If the return does not claim AOTC, go to Part V.)

	Yes	No
13 Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qualified tuition and related expenses for the claimed AOTC?	☐	☐

Part V Due Diligence Questions for Claiming HOH (If the return does not claim HOH filing status, go to Part VI.)

	Yes	No
14 Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax year and provided more than half of the cost of keeping up a home for a qualifying person?	☐	☐

Part VI Eligibility Certification

You will have complied with all due diligence requirements for claiming the applicable credit(s) and/or HOH filing status on the return of the taxpayer identified above if you:

- Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's responses on the return or in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s);
- Complete this Form 8867 truthfully and accurately and complete the actions described in this checklist for any applicable credit(s) claimed and HOH filing status, if claimed;
- Submit Form 8867 in the manner required; and
- Keep all five of the following records for 3 years from the latest of the dates specified in the Form 8867 instructions under *Document Retention*.
 - A copy of this Form 8867.
 - The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.
 - Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).
 - A record of how, when, and from whom the information used to prepare this form and the applicable worksheet(s) was obtained.
 - A record of any additional information you relied upon, including questions you asked and the taxpayer's responses, to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).

If you have not complied with all due diligence requirements, you may have to pay a penalty for each failure to comply related to a claim of an applicable credit or HOH filing status (see instructions for more information).

	Yes	No
15 Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct, and complete?	☒	☐

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

Attach to your tax return.

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

OMB No. 1545-2227

2023Attachment
Sequence No. **72**

Name(s) shown on your tax return

STEPHEN A. AND [REDACTED] PITRE

Your social security number or EIN
[REDACTED]**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	708.
2	Ordinary dividends (see instructions).....	2	66,358.
3	Annuities (see instructions).....	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions).....	4a	8,130.
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	8,130.
5a	Net gain or loss from disposition of property (see instructions).....	5a	113,451.
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	113,451.
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	188,647.

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	188,647.
Individuals:			
13	Modified adjusted gross income (see instructions).....	13	362,759.
14	Threshold based on filing status (see instructions).....	14	250,000.
15	Subtract line 14 from line 13. If zero or less, enter -0-.....	15	112,759.
16	Enter the smaller of line 12 or line 15.....	16	112,759.
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	4,285.
Estates and Trusts:			
18a	Net investment income (line 12 above).....	18a	
b	Deductions for distributions of net investment income and charitable deductions (see instructions).....	18b	
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-.....	18c	
19a	Adjusted gross income (see instructions).....	19a	
b	Highest tax bracket for estates and trusts for the year (see instructions).....	19b	
c	Subtract line 19b from line 19a. If zero or less, enter -0-.....	19c	
20	Enter the smaller of line 18c or line 19c.....	20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions).....	21	

2023

FEDERAL STATEMENTS

PAGE 1

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

06:39PM

STATEMENT 1
FORM 1040
WAGE SCHEDULE

TAXPAYER - EMPLOYER	WAGES	FEDERAL W/H	FICA	MEDI- CARE	STATE W/H	LOCAL W/H
STATE OF FLORIDA	174,112.	20,934.	9,932.	2,675.		
GRAND TOTAL	174,112.	20,934.	9,932.	2,675.	0.	0.

STATEMENT 2
FORM 1116, LINE 1A - PASSIVE CATEGORY INCOME
GROSS INCOME FROM SOURCES OUTSIDE U.S.FOREIGN COUNTRY OR U.S. POSSESSION: VARIOUS
FOREIGN SOURCE QUALIFIED DIVIDENDS.....

TOTAL	\$	9,525.
	\$	9,525.

STATEMENT 3
FORM 1116, LINE 10
FOREIGN TAX CREDIT CARRYOVERS

PASSIVE INCOME

	FOREIGN TAXES PAID	FOREIGN TAXES DISALLOWED	FOREIGN TAXES CLAIMED	FOREIGN TAX CREDIT CARRYOVER
2022 FOREIGN TAX CREDIT	1,028.	0.	1,028.	0.
2021 FOREIGN TAX CREDIT	625.	0.	38.	587.
2020 FOREIGN TAX CREDIT	0.	0.	0.	0.
2019 FOREIGN TAX CREDIT	0.	0.	0.	0.
2018 FOREIGN TAX CREDIT	0.	0.	0.	0.
2017 FOREIGN TAX CREDIT	0.	0.	0.	0.
2016 FOREIGN TAX CREDIT	0.	0.	0.	0.
2015 FOREIGN TAX CREDIT	0.	0.	0.	0.
2014 FOREIGN TAX CREDIT	0.	0.	0.	0.
2013 FOREIGN TAX CREDIT	0.	0.	0.	0.

TOTAL FOREIGN TAX CREDIT CARRYOVER - FORM 1116, LINE 10

\$	587.
----	------

STATEMENT 4
FORM 1116, LINE 1A - PASSIVE CATEGORY INCOME (AMT)
GROSS INCOME FROM SOURCES OUTSIDE U.S.FOREIGN COUNTRY OR U.S. POSSESSION: VARIOUS
FOREIGN SOURCE QUALIFIED DIVIDENDS.....

TOTAL	\$	9,525.
	\$	9,525.

2023

FEDERAL STATEMENTS

PAGE 2

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

06:39PM

STATEMENT 5
FORM 1116, LINE 10
FOREIGN TAX CREDIT CARRYOVERS

PASSIVE INCOME - AMT

	FOREIGN TAXES PAID	FOREIGN TAXES DISALLOWED	FOREIGN TAXES CLAIMED	FOREIGN TAX CREDIT CARRYOVER
2022 FOREIGN TAX CREDIT	1,028.	0.	672.	356.
2021 FOREIGN TAX CREDIT	625.	0.	0.	625.
2020 FOREIGN TAX CREDIT	825.	0.	800.	25.
2019 FOREIGN TAX CREDIT	0.	0.	0.	0.
2018 FOREIGN TAX CREDIT	0.	0.	0.	0.
2017 FOREIGN TAX CREDIT	0.	0.	0.	0.
2016 FOREIGN TAX CREDIT	0.	0.	0.	0.
2015 FOREIGN TAX CREDIT	0.	0.	0.	0.
2014 FOREIGN TAX CREDIT	0.	0.	0.	0.
2013 FOREIGN TAX CREDIT	0.	0.	0.	0.

TOTAL FOREIGN TAX CREDIT CARRYOVER - FORM 1116, LINE 10

\$ 1,006.

Form **8879**

(Rev. January 2021)

Department of the Treasury
Internal Revenue Service**IRS e-file Signature Authorization**

▶ ERO must obtain and retain completed Form 8879.

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

OMB No. 1545-0074

Submission Identification Number (SID) ▶

Taxpayer's name

STEPHEN A. PITRE

Spouse's name

PITRE

Social security number

Spouse's social security number

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

Enter whole dollars only on lines 1 through 5.

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

1	Adjusted gross income.....	1	362,759.
2	Total tax.....	2	50,511.
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099.....	3	20,934.
4	Amount you want refunded to you.....	4	
5	Amount you owe.....	5	8,737.

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

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

Taxpayer's PIN: check one box only

☒ I authorize **ANGELA J. PARKER, CPA, APAC** to enter or generate my PIN **[REDACTED]** as my signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

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

Your signature ▶

Date ▶

Spouse's PIN: check one box only

☒ I authorize **ANGELA J. PARKER, CPA, APAC** to enter or generate my PIN **[REDACTED]** as my signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

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

Spouse's signature ▶

Date ▶

Practitioner PIN Method Returns Only – continue below**Part III Certification and Authentication – Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.

Don't enter all zeros

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

ERO's signature ▶ **ANGELA P. KANGAS**

Date ▶

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

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

Form **8879** (Rev. 01-2021)

01/22/21

2023

E-FILE PAYMENT RECORD - BALANCE DUE

PAGE 1

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

06:39PM

Form Payment Record

The taxpayer's balance due or an estimated tax payment for next year will be paid electronically using the following information. Modify the bank and account information using the Direct Deposit / Electronic Payment input fields in Screen 3. To cancel payment, call the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the requested payment (settlement) date.

Name of Bank COASTAL BANK & TRUST

Routing Transit Number [REDACTED]

Bank Account Number [REDACTED]

Type of Account 1 1 = Checking; 2 = Savings

Amount of Tax Payment 8,737.

Tax Type 1040 1040, 1040-ES, 2350 or 4868

Requested Payment Date 4/01/24

Taxpayer's Daytime Phone Number 850-497-2156

2023

FINANCIAL TRANSACTION SUMMARY

PAGE 1

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

06:39PM

FEDERAL

2023 FEDERAL FORM 1040 ELECTRONIC FINANCIAL TRANSACTION INFORMATION.
THE TAXPAYER HAS AN AMOUNT DUE OF \$8,737 WHICH WILL BE DEBITED FROM THE
FOLLOWING ACCOUNT ON 4/1/2024.

NAME OF BANK: COASTAL BANK & TRUST
ROUTING TRANSIT NUMBER: [REDACTED]
ACCOUNT NUMBER: ***** [REDACTED]
ACCOUNT TYPE: CHECKING

LOUISIANA

2023 LOUISIANA FORM IT-540B ELECTRONIC FINANCIAL TRANSACTION INFORMATION.
THE TAXPAYER HAS AN AMOUNT DUE OF \$145 WHICH WILL BE DEBITED FROM THE
FOLLOWING ACCOUNT ON 4/1/2024.

NAME OF BANK: COASTAL BANK & TRUST
ROUTING TRANSIT NUMBER: [REDACTED]
ACCOUNT NUMBER: ***** [REDACTED]
ACCOUNT TYPE: CHECKING

2023

FEDERAL INCOME TAX SUMMARY

PAGE 1

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

6:38 PM

INCOME	2023	2022	DIFF
WAGES, SALARIES, TIPS, ETC.....	174,112	149,720	24,392
INTEREST INCOME.....	708	132	576
DIVIDEND INCOME.....	66,358	67,431	-1,073
REFUNDS OF STATE AND LOCAL TAXES.....	0	921	-921
CAPITAL GAIN OR LOSS.....	113,451	82,083	31,368
RENT, ROYALTY, PARTNERSHIP, SCORP, TRUST	8,130	7,421	709
TOTAL INCOME.....	362,759	307,708	55,051
ADJUSTMENTS TO INCOME			
TOTAL ADJUSTMENTS.....	0	0	0
ADJUSTED GROSS INCOME.....	362,759	307,708	55,051
ITEMIZED DEDUCTIONS			
TAXES.....	10,000	9,277	723
INTEREST.....	50	3,815	-3,765
CONTRIBUTIONS.....	5,385	20,107	-14,722
TOTAL ITEMIZED DEDUCTIONS.....	15,435	33,199	-17,764
TAX COMPUTATION			
STANDARD DEDUCTION.....	27,700	25,900	1,800
LARGER OF ITEMIZED OR STANDARD DEDUCTION	27,700	33,199	-5,499
QUALIFIED BUSINESS INCOME DEDUCTION.....	52	40	12
TAXABLE INCOME.....	335,007	274,469	60,538
TAX BEFORE CREDITS.....	52,095	41,555	10,540
CREDITS			
CHILD TAX CREDIT & OTHER DEPENDENT CR....	4,500	6,000	-1,500
FOREIGN TAX CREDIT.....	1,369	1,066	303
TOTAL CREDITS.....	5,869	7,066	-1,197
TAX AFTER CREDITS.....	46,226	34,489	11,737
OTHER TAXES			
OTHER TAXES.....	4,285	2,193	2,092
TOTAL TAX.....	50,511	36,682	13,829
PAYMENTS & REFUNDABLE CREDITS			
FEDERAL INCOME TAX WITHHELD.....	20,934	16,724	4,210
ESTIMATED TAX PAYMENTS.....	20,840	25,680	-4,840
TOTAL PAYMENTS.....	41,774	42,404	-630
REFUND OR AMOUNT DUE			
AMOUNT OVERPAID.....	0	5,722	-5,722
APPLIED TO NEXT YEAR'S ESTIMATED TAX.....	0	5,722	-5,722
AMOUNT YOU OWE.....	8,737	0	8,737
TAX RATES			
ORDINARY INCOME TAX BRACKET.....	22.0%	22.0%	0.0%
EFFECTIVE TAX RATE.....	15.1%	13.4%	1.7%

IT-540B-2D (Page 1 of 4)
**2023 LOUISIANA NONRESIDENT
AND PART-YEAR RESIDENT - 2D**

DEV ID

Name
Change

Decedent
Filing

Spouse
Decedent

Address
Change

Amended
Return

NOL

STEPHEN A PITRE

PITRE

P O BOX 607

GULF BREEZE

FL 32562

Your SSN

Spouse's SSN

Area code and daytime telephone number

MSRA

Nonresident
Return ☒

NRPA

Part-Year
Return

Your Date of Birth

Spouse's Date of Birth

FILING STATUS: Enter the appropriate number in the filing status box. It must agree with your federal return.

Enter a "1" in box if **single**.

Enter a "2" in box if **married filing jointly**.

2 Enter a "3" in box if **married filing separately**.

Enter a "4" in box if **head of household**.

If the qualifying person is not your dependent, enter name here.

Enter a "5" in box if **qualifying surviving spouse**.

If the qualifying person is not your dependent, enter name here.

6 EXEMPTIONS:

6A ☒ Yourself

65 or
older

Blind

6B ☒ Spouse

65 or
older

Blind

Total of
6A & 6B

2

6C DEPENDENTS — Enter dependent information below. If you have more than 6 dependents, attach a statement to your return with the required information. Enter the number of dependents claimed on your Federal Form 1040 or 1040-SR here.

6C

3

First Name

Last Name

Social Security Number

Relationship to you

Birth Date (mm/dd/yyyy)

PITRE

PITRE

PITRE

DAUGHTER

DAUGHTER

DAUGHTER

IMPORTANT!

All four (4) pages of this return **MUST** be mailed in together along with your W-2s and completed schedules. Please paperclip. **Do not staple.**

6D TOTAL EXEMPTIONS — Total of 6A, 6B, and 6C

6D

5

FOR OFFICE USE ONLY

Field
Flag

If you are not required to file a federal return, indicate wages here.

Mark this box and enter zero "0" on Line 14.

7	FEDERAL ADJUSTED GROSS INCOME — From the NPR worksheet, Federal column, Line 12	7	362759
8	LOUISIANA ADJUSTED GROSS INCOME — From the NPR worksheet, Line 20	8	8130
9	RATIO OF LOUISIANA ADJUSTED GROSS INCOME TO FEDERAL ADJUSTED GROSS INCOME	9	224
10A	FEDERAL ITEMIZED DEDUCTIONS	10A	0
10B	FEDERAL ITEMIZED DEDUCTION FOR MEDICAL AND DENTAL EXPENSES	10B	0
10C	FEDERAL STANDARD DEDUCTION	10C	0
10D	EXCESS FEDERAL ITEMIZED DEDUCTIONS — Subtract Line 10C from Line 10B	10D	0
10E	ALLOWABLE DEDUCTIONS — Multiply Line 10D by the percentage on Line 9. Round to the nearest dollar.	10E	0
11	LOUISIANA NET INCOME — Subtract Line 10E from Line 8. If less than zero, enter zero "0".	11	8130
12	YOUR LOUISIANA INCOME TAX	12	145
13	NONREFUNDABLE PRIORITY 1 CREDITS — From Schedule C-NR, Line 5	13	0
14	TAX LIABILITY AFTER NONREFUNDABLE PRIORITY 1 CREDITS — Subtract Line 13 from Line 12. If less than zero, enter zero "0".	14	145
15	2023 LOUISIANA REFUNDABLE CHILD CARE CREDIT — Your Federal Adjusted Gross Income must be EQUAL TO OR LESS THAN \$25,000 to claim the credit on this line. See the instructions and the Refundable Care Credit Worksheet.	15	0
15A	Enter the qualified expense amount from the Refundable Child Care Credit Worksheet, Line 3.	15A	0
15B	Enter the amount from the Refundable Child Care Credit Worksheet, Line 6.	15B	0
16	2023 LOUISIANA REFUNDABLE SCHOOL READINESS CREDIT — Your Federal Adjusted Gross Income must be EQUAL TO OR LESS THAN \$25,000 to claim the credit on this line. See the Refundable School Readiness Credit Worksheet.	16	0
	5 0 4 0 3 0 2 0		0
17	OTHER REFUNDABLE PRIORITY 2 CREDITS — From Schedule F-NR, Line 9	17	0
18	TOTAL REFUNDABLE PRIORITY 2 CREDITS — Add Lines 15, 16, and 17. Do not include amounts on Lines 15A and 15B.	18	0
19	TAX LIABILITY AFTER REFUNDABLE PRIORITY 2 CREDITS	19	145
20	OVERPAYMENT AFTER REFUNDABLE PRIORITY 2 CREDITS	20	0
21	NONREFUNDABLE PRIORITY 3 CREDITS — From Schedule J-NR, Line 16	21	0

Social Security Number

22	ADJUSTED LOUISIANA INCOME TAX - Subtract Line 21 from Line 19.	22	145
23A	CONSUMER USE TAX	23A	0
	☒ No use tax due.		
	Amount from the Consumer Use Tax Worksheet.		
23B	ELECTRIC AND HYBRID VEHICLE ROAD USAGE FEE	23B	0
	☒ No usage fee due.		
	Amount from Form R-19000A.		
24	TOTAL INCOME TAX, CONSUMER USE TAX, AND ELECTRIC AND HYBRID VEHICLE ROAD USAGE FEE. Add Lines 22, 23A, AND 23B.	24	145
25	OVERPAYMENT OF REFUNDABLE PRIORITY 2 CREDITS — Enter the amount from Line 20.	25	0
26	REFUNDABLE PRIORITY 4 CREDITS — From Schedule I-NR, Line 6	26	0
27	AMOUNT OF LOUISIANA TAX WITHHELD FOR 2023 — Attach Forms W-2 and 1099.	27	0
28	AMOUNT OF CREDIT CARRIED FORWARD FROM 2022	28	0
29	AMOUNT PAID ON YOUR BEHALF BY A COMPOSITE PARTNERSHIP FILING Enter name of partnership.	29	0
30	AMOUNT OF ESTIMATED PAYMENTS FOR 2023	30	0
31	AMOUNT OF EXTENSION PAYMENT	31	0
32	TOTAL REFUNDABLE TAX CREDITS AND PAYMENTS — Add Lines 25 through 31.	32	0
33	OVERPAYMENT — If Line 32 is greater than Line 24, subtract Line 24 from Line 32. Your overpayment may be reduced by Underpayment of Estimated Tax Penalty. Otherwise, go to Line 40.	33	0
34	UNDERPAYMENT PENALTY — See the instructions for Underpayment Penalty and Form R-210NR. If you are a farmer, check the box.	34	0
35	ADJUSTED OVERPAYMENT — If Line 33 is greater than Line 34, subtract Line 34 from Line 33, and enter on Line 35. If Line 34 is greater than Line 33, subtract Line 33 from Line 34, and enter the balance on Line 40.	35	0
36	TOTAL DONATIONS — From Schedule D-NR, Line 22	36	0
37	SUBTOTAL — Subtract Line 36 from Line 35. This amount of overpayment is available for credit or refund.	37	0
38	AMOUNT OF LINE 37 TO BE CREDITED TO 2024 INCOME TAX	38	0
	AMOUNT TO BE REFUNDED — Subtract Line 38 from Line 37. If mailing to LDR, use the address on the bottom of page 4.		
39	Enter a "2" in box if you want to receive your refund by paper check. Enter a "3" in box if you want to receive your refund by direct deposit. Complete information below. If information is unreadable, you are filing for the first time, or if you do not make a refund selection, you will receive your refund by paper check.	39	0

DIRECT DEPOSIT INFORMATION

Type: Checking

Savings

Will this refund be forwarded to a financial institution located outside the United States?

Yes

No

Routing
NumberAccount
Number

PITR

Social Security Number [REDACTED]

AMOUNTS DUE LOUISIANA

40	AMOUNT YOU OWE -- If Line 24 is greater than Line 32, subtract Line 32 from Line 24	40	145
41	ADDITIONAL DONATION TO THE MILITARY FAMILY ASSISTANCE FUND	41	0
42	ADDITIONAL DONATION TO THE COASTAL PROTECTION AND RESTORATION FUND	42	0
43	ADDITIONAL DONATION TO LOUISIANA FOOD BANK ASSOCIATION	43	0
44	INTEREST -- From the Interest Calculation Worksheet, Line 5.	44	0
45	DELINQUENT FILING PENALTY -- From the Delinquent Filing Penalty Calculation Worksheet Line 3.	45	0
46	DELINQUENT PAYMENT PENALTY -- From the Delinquent Payment Penalty Calculation Worksheet Line 7.	46	0
47	UNDERPAYMENT PENALTY -- See the instructions for Underpayment Penalty and Form R-210NR. If you are a farmer, check the box.	47	0
48	BALANCE DUE LOUISIANA -- Add Lines 40 through 47.	48	145

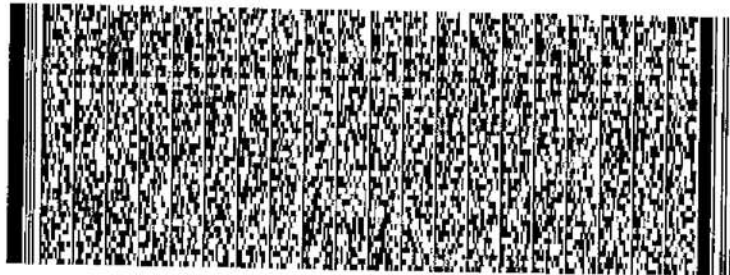
**PAY THIS AMOUNT.
DO NOT SEND CASH.**

IMPORTANT!

All four (4) pages of this return
MUST be mailed in together along
with your W-2s and completed
schedules. Please paperclip.
Do not staple.

Status 001

Contribution and Donation 0000



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. If I made a contribution to a START Savings Program, I consent that my Social Security Number may be given to the Louisiana Office of Student Financial Assistance to properly identify the START Savings Program account holder. If married filing jointly, both Social Security Numbers may be submitted. I understand that by submitting this form I authorize the disbursement of individual income tax refunds through the method as described on Line 39.

Your Signature		Date (mm/dd/yyyy)	Spouse's Signature (If filing jointly, both must sign.)		Date (mm/dd/yyyy)
PAID PREPARER USE ONLY	Print/Type Preparer's Name ANGELA P. KANGAS		Preparer's Signature ANGELA P. KANGAS		Date (mm/dd/yyyy) 3/14/2024
	Firm's Name ▶ ANGELA J. PARKER, CPA, APAC		Firm's FEIN ▶ [REDACTED]		Check ☒ if Self-employed
	Firm's Address ▶ 1997 SURGI DR MANDEVILLE, LA 70448		Telephone ▶ 985-624-8583		

Name
PITRIndividual Income Tax Return
Calendar year return due 5/15/2024

Mail to: Department of Revenue
P.O. BOX 3550
BATON ROUGE, LA 70821-3550

PTIN, FEIN, or
LDR Account Number
of Paid Preparer

For Office
Use Only.

2023 Nonresident and Part-Year Resident (NPR) Worksheet

See instructions for completing the NPR worksheet.

		Federal	Louisiana
1	Wages, salaries, tips, etc.		
2	Taxable interest	174112	
3	Dividends	708	
4	Business income (or loss) and farm income (or loss)	66358	
5	Gains (or losses)		
6	IRA distributions, pensions and annuities	113451	
7	Rental real estate, royalties, partnerships, S corporations, trusts, etc.		
8	Social Security benefits	8130	8130
9	Other income — Enter the amount of Louisiana NOL utilized		
10	Total Income — Add the income amounts on Lines 1-9 for each column.	362759	8130
11	Total Adjustments to Income		
12	Adjusted Gross Income — Subtract Line 11 from Line 10 for each column. Enter the amount in the Federal column on Form IT-540B, Line 7. The amount shown in the Federal column should agree with Federal Form 1040 or 1040-SR, Line 11.	362759	8130
Additions	13 Interest and dividend income from other states and their political subdivisions		
	14 Recapture of START contributions		
	15 Recapture of START K12 contributions		
	16 Add back of pass-through entity loss		
	17 Total — Add Lines 12 through 16.		8130

EXEMPT INCOME — Enter on Lines 18A through 18F; the amount of any exempt income included on Line 12 in the Louisiana column. Enter the description and associated code, along with the dollar amount. See the instructions.

	Exempt Income Description	Code	Amount
Subtractions	18A		
	18B		0
	18C		0
	18D		0
	18E		0
	18F		0
19	Total Exempt Income — Add Lines 18A through 18F.		0
20	LOUISIANA ADJUSTED GROSS INCOME. Subtract Line 19 from Line 17. Also, enter this amount on Form IT-540B, Line 8.		8130

Description - See instructions.	Code
Interest and Dividends on U.S. Government Obligations	01E
Louisiana State Employees' Retirement Benefits Taxpayer date retired: _____ Spouse date retired: _____	02E
Louisiana State Teachers' Retirement Benefits Taxpayer date retired: _____ Spouse date retired: _____	03E
Federal Retirement Benefits Taxpayer date retired: _____ Spouse date retired: _____	04E
Other Retirement Benefits — Provide name or statute: Taxpayer date retired: _____ Spouse date retired: _____	05E
Annual Retirement Income Exemption for Taxpayers 65 or over Provide name of pension or annuity: _____	06E

Description - See the instructions.	Code
Native American Income	08E
START Savings Program Contribution	09E
Military Pay Exclusion	10E
Road Home	11E
Recreation Volunteer	13E
Volunteer Firefighter	14E
Voluntary Retrofit Residential Structure	16E
Elementary and Secondary School Tuition	17E
Educational Expenses for Home-Schooled Children	18E
Educational Expenses for Quality Public Education	19E
Capital Gain from Sale of Louisiana Business	20E
Employment of Certain Qualified Disabled Individuals	21E
S Bank Shareholder Income Exclusion	22E
Entity Level Taxes Paid to Other States	23E
Pass-Through Entity Exclusion	24E
IRC Code 280C Expense	25E
COVID-19 Relief Benefits	27E
START K12 Savings Program Contributions	28E
Digital Nomads	29E
Other, see instructions. Identify:	49E

LA 8453

(1/24)

Louisiana

2023 Individual Income Tax Declaration for Electronic Filing

LOUISIANA

DEPARTMENT of REVENUE

Your first name and initial STEPHEN A. PITRE		Last name PITRE	1 Your Social Security Number [REDACTED]	2023
Spouse's first name and initial [REDACTED]		Last name PITRE	2 Spouse's Social Security Number [REDACTED]	
Present home address (number and street including apartment number or rural route) P O BOX 607		Daytime Telephone Number [REDACTED]		
City, town, or post office GULF BREEZE, FL 32562		State ZIP FL 32562		

Part A

Tax Return Information

Balance Due 145.

Refund Due _____

Part B

Direct Deposit of Refund (Optional) ☐ or Direct Debit (Optional) ☒Routing Number The first 2 digits of the routing number must be 01 through 12 or 21 through 32.
[REDACTED]

Direct Debit Payment

145.Account Number
[REDACTED]

Withdrawal Date

4/01/2024

MM DD YYYY

Type of Account: ☒ Checking ☐ Savings
(Check one.)Full Payment ☒ Partial Payment ☐
☐ Payment made/will be made by credit card.

PART C

Declaration of Taxpayer

☐ I consent that my refund be directly deposited as designated in Part B, and declare that the information shown in Part B is correct. If I have filed a joint return, this is an irrevocable appointment of the other spouse as an agent to receive the refund.☐ I do not want direct deposit of my refund, am a first-time filer with Louisiana, or am not receiving a refund. I understand that by not having my refund direct deposited I will receive my refund by paper check.☒ I authorize the Louisiana Department of Revenue and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in Part B for payment of my state taxes owed on this return. I also authorize the financial institutions involved in processing the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

I understand that if I have filed a balance due return and if the Louisiana Department of Revenue does not receive full and timely payment of my tax liability, I will remain liable for the tax liability and all applicable interest and penalties.

I declare that I have examined my state income tax return prepared for electronic transmission to the State of Louisiana and, to the best of my knowledge and belief, it is true and complete.

Please sign here.

Your signature _____

Date _____

Spouse's signature (if joint return) _____

Date _____

Part D

Declaration and Signature of Electronic Return Originator (ERO) and Paid Preparer

I declare that I have reviewed the above taxpayer's return and that the entries on the return are complete and correctly represented to the best of my knowledge based on the information submitted/furnished by the taxpayer. I also declare that I have complied with all of the requirements of the Louisiana Department of Revenue and in the Louisiana Handbook for Electronic Filers.

Please sign here. ANGELA P. KANGAS

Preparer's signature

[REDACTED]
Social Security Number or ID Number

Date _____

985-624-8583

Telephone

☒ Mark box if also ERO.

Electronic Return Originator's signature _____

Social Security Number or ID Number _____

Date _____

Telephone _____

This form is to be maintained by ERO. Do not submit to LDR.

2023

LA E-FILE PAYMENT RECORD - BALANCE DUE

PAGE 1

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

06:39PM

Form Payment Record

THE FORM IT-540B BALANCE DUE WILL BE PAID ELECTRONICALLY USING THE FOLLOWING INFORMATION. MODIFY THE BANK AND ACCOUNT INFORMATION USING THE LOUISIANA ELECTRONIC PAYMENT INPUT FIELDS IN SCREEN 3.

Name of Bank COASTAL BANK & TRUST

Routing Transit Number [REDACTED]

Bank Account Number [REDACTED]

Type of Account CHECKING

Amount of Tax Payment 145.00

Tax Type FORM IT-540B

Requested Payment Date 4/01/24

Taxpayer's Daytime Phone Number [REDACTED]

[REDACTED] 06/09/21

2023

LOUISIANA INCOME TAX SUMMARY

PAGE 1

CLIENT PITRS01

STEPHEN A. AND [REDACTED] PITRE

3/19/24

6:38 PM

	2023	2022	DIFF
FEDERAL ADJUSTED GROSS INCOME			
FEDERAL ADJUSTED GROSS INCOME.....	362,759	307,708	55,051
TAXABLE LOUISIANA INCOME.....	8,130	29,270	-21,140
TOTAL LOUISIANA INCOME.....	8,130	29,270	-21,140
RATIO OF LOUISIANA INCOME.....	2.24%	9.51%	-7.27%
DEDUCTIONS			
FEDERAL ITEMIZED DEDUCTIONS.....	0	33,199	-33,199
FEDERAL STANDARD DEDUCTION.....	0	25,900	-25,900
LOUISIANA INCOME			
LOUISIANA NET INCOME.....	8,130	29,270	-21,140
LOUISIANA INCOME TAX.....	145	591	-446
CREDITS			
ADJUSTED LOUISIANA INCOME TAX.....	145	591	-446
TOTAL LA INCOME/USE TAX.....	145	0	145
PAYMENTS			
TOTAL REFUNDABLE CREDITS AND PAYMENTS....	0	0	0
AMOUNTS DUE LOUISIANA			
AMOUNT YOU OWE.....	145	591	-446
TAX RATES			
MARGINAL TAX RATE.....	1.9%	3.5%	-1.7%
EFFECTIVE TAX RATE.....	1.8%	2.0%	-0.2%