

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/30/2025

General Information

Name: Hon Michelle T Morley

CONFIDENTIAL

PID 200688

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (5Th)	Elected Constitutional Officer	

Net Worth

My Net Worth as of December 31, 2024 was \$ 6,127,571.27.

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 \$ 196,736.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Discover CD	\$ 108,161.06
Truist Ch	\$ 23,726.24
SFCU Sv	\$ 1,216.44
SCFU Ch	\$ 2,837.97
SCFU MM	\$ 16,833.98
SCFU CD	\$ 261,073.63
SCFU CD	\$ 156,622.21
CNR 457	\$ 421,154.17
CNR IRA	\$ 1,469,478.95
CNR TOD	\$ 1,948,964.29
Truist MM	\$ 3,399.83
Priv Mortgage Royal	\$ 267,103.21
US SB	\$ 154,000.00
Homestead	\$ 288,330.00
{REDACTED}--1/2 interest	\$ 487,500.00
CR 706	\$ 130,000.00
CR 48	\$ 235,000.00
39 acres life estate	\$ 150,750.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Discover	PO Box 6103 Carol Stream, IL 60197-6103	\$ 1,980.52

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

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 2024 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.

PRIMARY SOURCES OF INCOME:

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

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.

Michelle T Morley

Digitally signed: 06/30/2025

Filed with COE: 06/30/2025

Tangible Assets: Michelle T Morley, (as of December 31, 2024)

Circuit Judge Retired

5th Judicial Circuit

2022 Ford F-250	60,000
2025 Chevy	43,886
Horses (2)	3,000
2003 Horse Trailer	10,000
Bush Hog Utility Vehicle	750
Tools	1000
Jewelry	100
Furniture and electronics	500
Utility Trailer	250
1991 Tractor	3000
Tractor Accessories	500
Gravelly Mower	750
1977 Horse Trailer	3000
Motor Home	55,000
1939 Chevy	15,000
TOTAL Tangible Assets	\$196,736

a Employer's social security number		22-20-05-00-110		0000000030	
b Employer identification number (EIN) 59-6001874		1 Wages, tips, other compensation 164,730.52		2 Federal income tax withheld 35,073.84	
c Employer's name, address, and ZIP code State of Florida Jimmy Patronis, Chief Financial Officer 200 E Gaines Street Tallahassee, Florida 32399-0356		3 Social security wages 168,600.00		4 Social security tax withheld 10,453.20	
		5 Medicare wages and tips 192,230.52		6 Medicare tax withheld 2,787.34	
		7 Social security tips		10 Dependent care benefits	
d Control number 014734 01/07		11 Nonqualified plans		12a See instructions for box 12 G 27,500.00	
e Employee's first name, middle initial, and last name MICHELLE T MORLEY		13 Statutory employee ☐ Retirement plan ☐ Third-party sick pay ☐		12b DD 9,842.88	
		14 Other 125 1,800.00		12c	
				12d	
				12e	
f Employee's address and ZIP code		16 State wages, tips, etc.		17 State income tax	
15 State Employer's state ID number		18 Local wages, tips, etc.		19 Local income tax	
				20 Locality name	

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

2024

Copy C - For EMPLOYEE'S RECORDS
AA427W Rev. 05/31/2024

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

OMB No. 1545-0048

For the year Jan. 1 - Dec. 31, 2024, or other tax year beginning _____, ending _____

Your first name and middle initial **MICHELLE T.** Last name **MORLEY** See separate instructions.
Your social security number _____

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

Home address (number and street). If you have a P.O. box, see instructions. _____ Apt. no. _____ Presidential Election Campaign
Check here if you, or your
spouse if filing jointly, want \$3 to
go to this fund. Checking a box
below will not change your tax or
refund. ☐ You ☐ Spouse

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

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

Filing Status ☒ Single ☐ Head of household (HOH)
Check only one box. ☐ Married filing jointly (even if only one had income)
☐ Married filing separately (MFS) ☐ Qualifying surviving spouse (QSS)
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is
a child but not your dependent: _____
☐ If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name
(see instructions and attach statement if required): _____

Digital Assets At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell,
exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

Standard Deduction Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: ☒ Were born before January 2, 1960 ☐ Are blind Spouse: ☐ Was born before January 2, 1960 ☐ Is blind

Dependents (see instructions):

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

Income

1a Total amount from Form(s) W-2, box 1 (see instructions) **STMT 1** 1a 164,731.

b Household employee wages not reported on Form(s) W-2 1b

c Tip income not reported on line 1a (see instructions) 1c

d Medicaid waiver payments not reported on Form(s) W-2 (see instructions) 1d

e Taxable dependent care benefits from Form 2441, line 26 1e

f Employer-provided adoption benefits from Form 8839, line 29 1f

g Wages from Form 8919, line 6 1g

h Other earned income (see instructions) 1h

i Nontaxable combat pay election (see instructions) 1i

z Add lines 1a through 1h. 1z 164,731.

2a Tax-exempt interest 2a 2,738. b Taxable interest 2b 49,996.

3a Qualified dividends 3a 29,366. b Ordinary dividends 3b 31,197.

4a IRA distributions 4a b Taxable amount 4b

5a Pensions and annuities 5a b Taxable amount 5b

6a Social security benefits 6a 34,496. b Taxable amount 6b 29,322.

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

7 Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐ 7 82,367.

8 Additional income from Schedule 1, line 10 8

9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** 9 357,613.

10 Adjustments to income from Schedule 1, line 26 10

11 Subtract line 10 from line 9. This is your **adjusted gross income** 11 357,613.

12 **Standard deduction or itemized deductions** (from Schedule A) 12 16,550.

13 Qualified business income deduction from Form 8995 or Form 8995-A 13 78.

14 Add lines 12 and 13 14 16,628.

15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income** 15 340,985.

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

Attach Sch. B if required.

Standard Deduction for -

- Single or Married filing separately, \$14,600
- Married filing jointly or Qualifying surviving spouse, \$29,200
- Head of household, \$21,900
- 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	67,807.
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	67,807.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	103.
	21	Add lines 19 and 20	21	103.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	67,704.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	5,989.
24	Add lines 22 and 23. This is your total tax	24	73,693.	

Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2 SEE STATEMENT 6	25a	35,074.
	b	Form(s) 1099	25b	
	c	Other forms (see instructions)	25c	
	d	Add lines 25a through 25c	25d	35,074.
	26	2024 estimated tax payments and amount applied from 2023 return STATEMENT 7	26	12,000.
	27	Earned income credit (EIC)	27	
	28	Additional child tax credit from Schedule 8812	28	
	29	American opportunity credit from Form 8863, line 8	29	
	30	Reserved for future use	30	
31	Amount from Schedule 3, line 15	31		
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32		
33	Add lines 25d, 26, and 32. These are your total payments	33	47,074.	

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 2025 estimated tax	36		

Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to www.irs.gov/Payments or see instructions	37	26,619.
	38	Estimated tax penalty (see instructions)	38	

Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions ☒ Yes. Complete below. ☐ No		
	Designee's name	Phone no.	Personal identification number (PIN)
	LEE WILEY	352-787-0852	

Sign Here	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	Your signature	Date	Your occupation
			CIRCUIT COURT
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
	LEE WILEY			P00142319	

Firm's name	WILEY, WILEY & ASSOCIATES, PA	Phone no.	352-787-0852
Firm's address	201 NORTH 2ND STREET LEESBURG, FL 34748	Firm's EIN	20-4916740

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

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

2024

Attachment
Sequence No. **02**

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

MICHELLE T. MORLEY

Your social security number

Part I Tax

1 Additions to tax:			
a Excess advance premium tax credit repayment. Attach Form 8962	1a		
b Repayment of new clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part II. Attach Form 8936 and Schedule A (Form 8936)	1b		
c Repayment of previously owned clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part IV. Attach Form 8936 and Schedule A (Form 8936)	1c		
d Recapture of net EPE from Form 4255, line 2a, column (i)	1d		
e Excessive payments (EP) from Form 4255. Check applicable box and enter amount. (i) ☐ Line 1a, column (n) (ii) ☐ Line 1c, column (n) (iii) ☐ Line 1d, column (n) (iv) ☐ Line 2a, column (n)	1e		
f 20% EP from Form 4255. Check applicable box and enter amount. See instructions. (i) ☐ Line 1a, column (o) (ii) ☐ Line 1c, column (o) (iii) ☐ Line 1d, column (o) (iv) ☐ Line 2a, column (o)	1f		
y Other additions to tax (see instructions):	1y		
z Add lines 1a through 1y		1z	
2 Alternative minimum tax. Attach Form 6251		2	0.
3 Add lines 1z 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	5,989.
13 Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12		13	
14 Interest on tax due on installment income from the sale of certain residential lots and timeshares		14	
15 Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000		15	
16 Recapture of low-income housing credit. Attach Form 8611		16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2024

Part II Other Taxes (continued)

17	Other additional taxes:		
a	Recapture of other credits. List type, form number, and amount	17a	
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	17b	
c	Additional tax on HSA distributions. Attach Form 8889	17c	
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17d	
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e	
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f	
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g	
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h	
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i	
j	Section 72(m)(5) excess benefits tax	17j	
k	Golden parachute payments	17k	
l	Tax on accumulation distribution of trusts	17l	
m	Excise tax on insider stock compensation from an expatriated corporation	17m	
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n	
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o	
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p	
q	Any interest from Form 8621, line 24	17q	
z	Any other taxes. List type and amount:	17z	
18	Total additional taxes. Add lines 17a through 17z		18
19	Recapture of net EPE from Form 4255, line 1d, column (I)		19
20	Section 965 net tax liability installment from Form 965-A	20	
21	Add lines 4, 7 through 16, 18, and 19. These are your total other taxes . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b		21 5,989.

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

2024

Attachment
Sequence No. 03

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

Your social security number

MICHELLE T. MORLEY

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	103.
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	103.

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	Section 1341 credit for repayment of amounts included in income from earlier years	13b	
c	Net elective payment election amount from Form 3800, Part III, line 6, column (j)	13c	
d	Deferred amount of net 965 tax liability (see instructions)	13d	
z	Other refundable credits (see instructions):	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	

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

Schedule 3 (Form 1040) 2024

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

2024
Attachment
Sequence No. 08

Your social security number

MICHELLE T. MORLEY

Part I
Interest

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

DISCOVER BANK
LYDIA ROYAL
PERSHING LLC
PERSHING LLC - AIP
SUNCOAST CREDIT UNION
TRUIST BANK

Amount

4,677.
12,149.
2,862.
-681.
18,031.
12,958.

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

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

49,996.

49,996.

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

Part II
Ordinary Dividends

- 5 List name of payer:
PERSHING LLC

31,197.

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.

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

31,197.

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

Part III
Foreign Accounts and Trusts

Caution: If required, failure to file FinCEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See Instr. 427501 10-25-24

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 2024, 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 2024, 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

2024

Attachment
Sequence No. 12

Name(s) shown on return

Your social security number

MICHELLE T. MORLEY

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	195,075.	199,103.		<4,028.>
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7 <4,028.>

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	535,852.	457,008.		78,844.
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked	39,000.	31,453.		7,547.
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions. See the instructions			STMT 10	13 4.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2				15 86,395.

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

Schedule D (Form 1040) 2024

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	82,367.
• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.		
17 Are lines 15 and 16 both gains? ☒ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet	18	
19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet SEE STATEMENT 11	19	
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: • The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500) } Note: When figuring which amount is smaller, treat both amounts as positive numbers.	21	()
22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Recipient's Name and Address:
MICHELLE T MORLEY
TOD DTD 02/28/2022

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Number:

2024 TAX and
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SUMMARY OF TRANSACTIONS WE DO NOT REPORT TO THE IRS (See Instructions for additional information)

Securities Purchased with Accrued Interest Paid	Amount
U.S. Corporations	\$680.83
Total Accrued Interest Purchased	\$680.83
Advisory Fees and Other Expenses	(\$27,959.89)

PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)
OMB No. 1545-0715

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Disposition: Quantity, Date Acquired, Date Sold or Disposed, Proceeds, Cost or Other Basis, D=Marked Discount (D), O=Option Premium, W=Wash Sale Loss (W), Realized Gain or (Loss)

Short-Term Transactions for Which Basis is Reported to the IRS - Report on Form 8949, Part I, with Box A checked.

Short-Term Transactions for Which Basis is Reported to the IRS - Report on Form 8949, Part I, with Box A checked.	Quantity	Date Acquired	Date Sold or Disposed	Proceeds	Cost or Other Basis	D=Marked Discount (D)	O=Option Premium	W=Wash Sale Loss (W)	Realized Gain or (Loss)
Covered (Box 12)									
Description (Box 1a): CSX CORP COM	150.0000	12/27/2023	10/18/2024	5,129.10	5,212.73				(83.63)
SELL									
Description (Box 1a): FRANKLIN RES INC COM	390.0000	12/13/2023	09/26/2024	8,043.33	10,349.55				(2,306.22)
SELL									
Description (Box 1a): INTERNATIONAL BUSINE SS MACHS CORP COM	120.0000	03/30/2023	02/29/2024	22,339.02	15,523.80				6,815.22
SELL									
Description (Box 1a): ISHARES TR RUSSELL MID-CAP VALUE ETF	510.0000	03/13/2024	06/11/2024	61,611.38	62,179.20				(567.82)
SELL									
Description (Box 1a): ISHARES TR BLACKROCK ULTRA SHORT-TERM BD ETF	600.0000	04/25/2023	02/29/2024	30,323.75	30,169.62				154.13
SELL									
Description (Box 1a): PROLOGIS INC COM	50.0000	06/21/2024	11/21/2024	5,721.07	5,488.00				233.07
SELL									
Description (Box 1a): ROPER TECHNOLOGIES INC COM	10.0000	03/16/2023	01/30/2024	5,592.55	4,191.00				1,401.55
SELL									

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2024 TAX and
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2024 Form 1099-B

PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)

OMB No. 1545-0715 (continued)

Disposition Transaction	Quantity (Box 1a)	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	D-Market Discount (1f) O-Option Premium W-Wash Sale Loss (1g)	Realized Gain or (Loss)
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Short-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part I, with Box A checked.
Covered (Box 12) (continued)

Description (Box 1a): SPDR SER TR BLOOMBER G BARCLAYS 1-3 YR US TREAS INDEX

SELL	900.0000	04/26/2023	01/10/2024	26,124.54	26,313.75		(189.21)
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Description (Box 1a): SCHLUMBERGER LTD COM ISIN# JMB068571086

SELL	100.0000	11/22/2023	10/18/2024	4,229.38	5,213.84		(984.46)
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Description (Box 1a): TESLA INC COM

SELL	25.0000	10/11/2023	03/13/2024	4,325.21	6,541.96		(2,216.75)
SELL	40.0000	12/27/2023	03/13/2024	6,920.34	10,448.40		(3,528.06)
SELL	3.0000	12/29/2023	03/13/2024	519.03	765.09		(246.06)
SELL	35.0000	02/05/2024	03/13/2024	6,055.30	6,357.75		(302.45)
SALE DATE TOTAL	103.0000	VARIOUS	03/13/2024	17,819.88	24,113.20		(6,293.32)

Description (Box 1a): WALGREENS BOOTS ALLIANCE INC COM

SELL	225.0000	06/21/2024	07/03/2024	2,517.77	3,571.50		(1,059.73)
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Description (Box 1a): WENDYS CO COM

SELL	305.0000	05/02/2023	03/13/2024	5,633.30	6,771.00		(1,137.70)
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Short-Term Covered Total \$195,075.07 \$199,103.19 (\$4,028.12)

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.
Covered (Box 12)

Description (Box 1a): ACCENTURE PLC IREL AN D SHS C/A ISIN#IE00 B4BNM734

SELL	15.0000	01/31/2022	01/30/2024	5,609.95	5,229.27		380.68
SELL	15.0000	05/27/2022	01/30/2024	5,609.96	4,535.10		1,074.86
SALE DATE TOTAL	30.0000	VARIOUS	01/30/2024	11,219.91	9,764.37		1,455.54

Description (Box 1a): TRANE TECHNOLOGIES PLC SHS ISIN#IE00R9Z Q967

SELL	10.0000	08/09/2019	05/12/2024	3,342.44	932.33		2,410.11
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Recipient's Name and Address
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2024 TAX and
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2024 Form 1099-B
PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)
OMB No. 1545-0715 (continued)

Disposition Transaction
Quantity (Box 1a)
Date Acquired (Box 1b)
Date Sold or Disposed (Box 1c)
Proceeds (Box 1d)
Cost or Other Basis (Box 1e)
B=Marked Discount (1)
O=Option Premium
W=Wash Sale Loss (1p)
Realized Gain or (Loss)
Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.
Covered (Box 12) (continued)

Description (Box 1a): ALTRIA GROUP INC.COM							
SELL	25.0000	11/16/2021	10/18/2024	1,238.53	1,118.50		120.03
SELL	25.0000	01/31/2022	10/18/2024	1,238.54	1,263.38		(24.84)
SALE DATE TOTAL	50.0000	VARIOUS	10/18/2024	2,477.07	2,381.88		95.19
CUSIP: 022095103							

Description (Box 1a): ANHEUSER BUSCH INBEV SA NV SPONSORED ADR ISIN#US03524A1088							
SELL	105.0000	05/11/2022	03/01/2024	6,323.23	5,790.69		532.54
SELL	135.0000	07/18/2022	03/01/2024	8,129.86	7,446.60		683.26
SALE DATE TOTAL	240.0000	VARIOUS	03/01/2024	14,453.09	13,237.29		1,215.80
SELL	1.0000	07/18/2022	10/18/2024	66.05	55.16		10.89
SELL	55.0000	07/18/2022	11/21/2024	3,010.90	3,033.80		(22.90)
SELL	2.0000	07/18/2022	11/22/2024	109.33	110.32		(0.99)
SECURITY TOTAL				17,639.37	16,436.57		1,202.80
CUSIP: 03524A108							

Description (Box 1a): APPLE INC.COM							
SELL	45.0000	08/09/2019	03/01/2024	8,022.65	2,272.77		5,749.88
SELL	40.0000	02/28/2020	03/01/2024	7,131.24	2,729.98		4,401.26
SELL	10.0000	01/31/2022	03/01/2024	1,782.81	1,722.55		60.26
SALE DATE TOTAL	95.0000	VARIOUS	03/01/2024	16,936.70	6,725.30		10,211.40
CUSIP: 03783100							

Description (Box 1a): BERKSHIRE HATHAWAY INC DEL CL.B NEW							
SELL	41.5000	01/22/2018	01/30/2024	15,908.89	8,909.22		6,999.67
SELL	41.5000	01/31/2022	01/30/2024	15,906.90	12,868.86		3,020.24
SALE DATE TOTAL	83.0000	VARIOUS	01/30/2024	31,815.79	21,777.88		10,019.91
CUSIP: 084670702							

Description (Box 1a): CITIZENS FHL GROUP INC.COM							
SELL	90.0000	04/05/2022	10/18/2024	3,821.99	3,894.75		(72.76)
SELL	3.0000	04/05/2022	11/22/2024	142.32	129.83		12.49
SECURITY TOTAL				3,964.31	4,024.58		(60.27)
CUSIP: 774610105							

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PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)

OMB No. 1545-0715 (continued)

Disposition Transaction Quantity (Box 1a) Date Acquired (Box 1b) Date Sold or Disposed (Box 1c) Proceeds (Box 1d) Cost or Other Basis (Box 1e) D=Market Discount (H) O=Option Premium W=Wash Sale Loss (11g) Realized Gain or (Loss)

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.

Covered (Box 12) (continued)

Description (Box 1a): COSTCO WHOLESALE CORP NEW COM

CUSIP: 22160K105

SELL	4.0000	08/20/2019	03/01/2024	2,993.70	1,096.22		1,897.48
SELL	5.0000	08/27/2019	03/01/2024	3,742.12	1,459.20		2,282.92
SELL	1.0000	01/31/2022	03/01/2024	748.42	498.53		249.89
SALE DATE TOTAL	10.0000	VARIOUS	03/01/2024	7,484.24	3,053.95		4,430.29
SELL	5.0000	01/31/2022	07/23/2024	4,235.72	2,492.63		1,743.09
SELL	3.0000	01/31/2022	07/25/2024	2,489.92	1,495.57		994.35
SELL	1.0000	05/27/2022	07/25/2024	829.98	467.26		362.72
SALE DATE TOTAL	4.0000	VARIOUS	07/25/2024	3,319.90	1,962.03		1,357.07
SECURITY TOTAL				15,039.86	7,509.41		7,530.45

Description (Box 1a): DISNEY WAL T CO DISNEY COM

CUSIP: 254687106

SELL	22.5000	06/21/2019	05/12/2024	2,317.05	3,168.47		(871.42)
SELL	10.0000	11/26/2019	05/12/2024	1,029.80	1,515.60		(485.80)
SELL	32.5000	01/31/2022	05/12/2024	3,346.84	4,576.33		(1,229.49)
SALE DATE TOTAL	65.0000	VARIOUS	05/12/2024	6,693.69	9,260.40		(2,566.71)

Description (Box 1a): DUKE ENERGY CORP NEW COM NEW

CUSIP: 26441C204

SELL	30.0000	01/31/2022	10/18/2024	3,606.19	3,130.50		475.69
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Description (Box 1a): EOG RES INC COM

CUSIP: 26875P101

SELL	15.0000	01/06/2022	10/18/2024	1,894.26	1,429.40		464.86
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Description (Box 1a): EMERSON ELEC CO COM

CUSIP: 291011004

SELL	55.0000	08/24/2020	02/12/2024	5,829.40	3,790.01		2,039.39
SELL	55.0000	01/31/2022	02/12/2024	5,829.40	5,003.29		826.11
SELL	90.0000	04/05/2022	02/12/2024	9,539.03	8,749.73		789.30
SALE DATE TOTAL	200.0000	VARIOUS	02/12/2024	21,197.83	17,543.03		3,654.80

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PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)

OMB No. 1545-0715 (continued)

Disposition Transaction	Quantity (Box 1a)	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	B = Market Discount (D) O = Option Premium W = Wash Sale Loss (T) Realized Gain or (Loss)
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Long-Term Transactions for Which Basis is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.

Covered (Box 12) (continued)

Description (Box 1a): EMERSON ELEC CO COM						
SELL	50.0000	04/05/2022	03/19/2024	5,565.89	4,860.96	704.93
SELL	80.0000	10/06/2022	03/19/2024	8,905.43	6,401.41	2,504.02
SALE DATE TOTAL	130.0000	VARIOUS	03/19/2024	14,471.32	11,262.37	3,208.95
SECURITY TOTAL				35,649.15	28,805.40	6,843.75

Description (Box 1a): EQUINIX INC COM PAR \$0.001						
SELL	2.5000	06/27/2019	01/30/2024	2,073.73	1,238.12	835.61
SELL	2.5000	01/31/2022	01/30/2024	2,073.73	1,793.27	280.46
SALE DATE TOTAL	5.0000	VARIOUS	01/30/2024	4,147.46	3,031.39	1,116.07

Description (Box 1a): EXXON MOBIL CORP COM						
	0.4680	12/15/2022	05/03/2024	54.27	49.01	5.26

Description (Box 1a): FORD MTR CO DEL COM PAR \$0.01						
SELL	30.0000	05/02/2023	10/18/2024	333.59	360.90	(27.31)
SELL	10.0000	05/02/2023	11/22/2024	110.92	120.30	(9.38)
SELL	10.0000	05/02/2023	11/26/2024	111.16	120.30	(9.14)
SECURITY TOTAL				555.67	601.50	(45.83)

Description (Box 1a): GENERAL MILS INC COM						
SELL	45.0000	06/02/2020	10/18/2024	3,143.61	2,834.79	308.82
SELL	20.0000	09/16/2020	10/18/2024	1,397.16	1,184.71	212.45
SELL	35.0000	07/31/2022	10/18/2024	2,445.03	2,398.90	46.13
SALE DATE TOTAL	100.0000	VARIOUS	10/18/2024	6,985.80	6,418.40	567.40

Description (Box 1a): GILEAD SCIENCES INC COM						
SELL	195.0000	06/15/2022	02/09/2024	14,226.92	11,366.24	2,860.75
SELL	70.0000	08/25/2022	02/09/2024	5,107.12	4,469.50	637.62
SALE DATE TOTAL	265.0000	VARIOUS	02/09/2024	19,334.11	15,835.74	3,498.37

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PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)

OMB No. 1545-0715 (continued)

Disposition Transaction Quantity (Box 1a) Date Acquired (Box 1b) Date Sold or Disposed (Box 1c) Proceeds (Box 1d) Cost or Other Basis (Box 1e) B=Market Discount (B)
O=Option Premium
W=Wash Sale Loss (W) Realized Gain or (Loss)

Long-Term Transactions for Which Basis Is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.
Covered (Box 12) (continued)

Description (Box 1a): HCA HEALTHCARE INC COM						
SELL	3.0000	06/09/2020	01/30/2024	899.99	345.77	554.22
SELL	25.0000	01/31/2022	01/30/2024	7,499.94	5,956.38	1,543.56
SELL	10.0000	04/22/2022	01/30/2024	2,999.97	2,190.08	809.89
SALE DATE TOTAL	38.0000	VARIOUS	01/30/2024	11,399.90	8,492.23	2,907.67

Description (Box 1a): HARTFORD FINL SVCS GROUP INC COM						
SELL	133.0000	06/29/2022	03/19/2024	13,343.10	8,750.07	4,593.03
Description (Box 1a): INTERNATIONAL BUSINESS MACHS CORP COM						
SELL	30.0000	03/30/2023	06/18/2024	5,059.49	3,890.95	1,178.54

Description (Box 1a): IISHARES TR 1.5 YR IN VT GRADE CORPORATE B D ETF						
SELL	700.0000	07/08/2022	02/05/2024	35,779.44	35,412.93	366.51
SELL	1,331.0000	07/08/2022	03/13/2024	68,080.10	67,335.15	744.95
SECURITY TOTAL				103,859.54	102,748.08	1,111.46

Description (Box 1a): KLA CORP COM						
SELL	4.0000	12/21/2023	12/30/2024	2,526.40	2,361.77	164.63
Description (Box 1a): MASTERCARD INC CL A						
SELL	13.0000	08/20/2019	02/29/2024	6,213.95	3,607.40	2,606.55
SELL	15.0000	01/31/2022	02/29/2024	7,169.94	5,771.30	1,448.64
SELL	5.0000	01/31/2022	02/29/2024	2,389.98	1,907.10	482.88
SELL	27.0000	07/18/2022	02/29/2024	12,905.90	9,030.07	3,875.83
SALE DATE TOTAL	60.0000	VARIOUS	02/29/2024	28,679.77	20,265.87	8,413.90

SELL	1.0000	07/18/2022	06/21/2024	451.10	334.45	116.65
SELL	1.0000	07/18/2022	06/28/2024	444.74	334.45	110.29
SECURITY TOTAL				29,575.61	20,934.77	8,640.84

Recipient's Name and Address:
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PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)

OMB No. 1545-0715 (continued)

Long-Term Transactions for Which Basis is Reported to the IRS - Report on Form 8949, Part II, with Box D checked.
Covered (Box 12) (continued)

Disposition Transaction	Quantity (Box 1a)	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	D=Market Discount (D) O=Option Premium W=Wash Sale Loss (W)	Realized Gain or (Loss)
Description (Box 1a): MERCK & CO INC NEW C OM							
SELL	60.0000	08/11/2022	11/22/2024	6,081.43	5,375.40	CUSIP: 58933Y105	706.03
Description (Box 1a): METLIFE INC COM							
SELL	194.0000	05/27/2022	09/13/2024	14,729.53	13,023.22	CUSIP: 59756R108	1,706.31
Description (Box 1a): MICROSOFT CORP COM							
SELL	25.0000	08/27/2019	02/26/2024	10,224.44	3,397.05	CUSIP: 59491B104	6,827.39
Description (Box 1a): NORTHROP GRUMMAN CORP COM							
SELL	2.0000	06/27/2019	10/16/2024	1,056.76	634.21	CUSIP: 666807702	422.55
Description (Box 1a): OCCIDENTAL PETE CORP COM							
SELL	60.0000	02/14/2023	09/13/2024	3,083.01	3,953.20	CUSIP: 674599105	(870.19)
Description (Box 1a): QUANTA SVCS INC COM							
SELL	20.0000	03/24/2022	07/23/2024	5,301.39	2,643.21	CUSIP: 74762E102	2,658.18
SELL	20.0000	10/24/2022	07/23/2024	5,301.39	2,744.80		2,556.59
SALE DATE TOTAL	40.0000	VARIOUS	07/23/2024	10,602.78	5,388.01		5,214.77
SELL	2.0000	10/24/2022	07/23/2024	503.06	274.48		228.58
SECURITY TOTAL				11,105.84	5,662.49		5,443.35
Description (Box 1a): ROPER TECHNOLOGIES INC COM							
SELL	6.5000	07/30/2019	01/30/2024	3,628.66	2,382.04	CUSIP: 776696106	1,246.62
SELL	2.0000	08/27/2019	01/30/2024	1,116.51	709.01		407.50
SELL	8.5000	01/31/2022	01/30/2024	4,745.17	3,685.56		1,059.61
SALE DATE TOTAL	17.0000	VARIOUS	01/30/2024	9,490.34	6,776.61		2,713.73
Description (Box 1a): SCHLUMBERGER LTD COM ISIN# AN806S71086							
SELL	40.0000	08/04/2023	10/16/2024	1,691.75	2,336.40	CUSIP: 806857108	(644.65)
Description (Box 1a): STARBUCKS CORP COM							
SELL	40.0000	06/27/2022	01/30/2024	3,719.97	3,120.00	CUSIP: 885244109	599.97

Recipient's Name and Address:
MICHELLE T MORLEY
TOD DTD 02/28/2022

Account Number:
Recipient's Identification
Number:

2024 TAX and
YEAR-END STATEMENT
As of 01/31/2025
Mailed by 02/14/2025

2024 Form 1099-B

PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)

OMB No. 1545-0715 (continued)

Disposition Transaction Quantity (Box 1a) Date Acquired (Box 1b) Date Sold or Disposed (Box 1c) Proceeds (Box 1d) Cost or Other Basis (Box 1e) D-Identified Discrepancy (1f) O-Option Premium W-Wash Sale Loss (1g) Realized Gain or (Loss)

Covered (Box 12) (continued)

SELL	22.5000	03/19/2021	01/04/2024	2,059.63	1,493.23		566.40
SELL	25.0000	01/06/2022	01/04/2024	2,288.48	1,887.59		400.89
SELL	37.5000	01/31/2022	01/04/2024	3,432.72	2,679.38		753.34
SALE DATE TOTAL	85.0000	VARIOUS	01/04/2024	7,780.83	6,060.20		1,720.63

Description (Box 1a): THERMO FISHER SCIENTIFIC INC COM	CUSIP: 883556102						
SELL	7.5000	07/30/2019	12/30/2024	3,887.59	2,145.19		1,742.40
SELL	1.5000	01/31/2022	12/30/2024	777.52	865.34		(87.82)
SALE DATE TOTAL	9.0000	VARIOUS	12/30/2024	4,665.11	3,010.53		1,654.58

Description (Box 1a): UNUM GROUP COM	CUSIP: 91529Y106						
SELL	20.0000	05/17/2023	10/18/2024	1,273.76	920.59		353.17
Description (Box 1a): VANGUARD SCOTTSDALE FDS VANGUARD INTERMEDIATE-TERM CORPORATE	CUSIP: 92206C870						
SELL	1,256.0000	04/01/2022	01/30/2024	101,597.02	107,808.76		(6,211.74)

Description (Box 1a): WALMART INC COM	CUSIP: 931M203						
SELL	27.5000	08/09/2019	01/04/2024	4,378.24	2,969.44		1,408.80
SELL	22.5000	01/31/2022	01/04/2024	3,582.19	3,113.33		468.86
SALE DATE TOTAL	50.0000	VARIOUS	01/04/2024	7,960.43	6,082.77		1,877.66

Description (Box 1a): WHIRLPOOL CORP COM	CUSIP: 963320106						
SELL	10.0000	05/03/2023	10/18/2024	1,071.57	1,420.70		(349.13)
Description (Box 1a): WILLIAMS COS INC COM	CUSIP: 969457100						
SELL	71.0000	06/27/2022	09/13/2024	3,178.58	2,104.21		1,074.37

Long-Term Covered Total				\$535,852.46	\$457,008.27		\$78,844.19
Covered Total				\$730,927.53	\$656,111.46		\$74,816.07

Recipient's Name and Address
MICHELLE T MORLEY
TOD DTD 02/28/2022

Account Number
Recipient's Identification
Number

2024 TAX and
YEAR-END STATEMENT
As of 01/31/2025
Mailed by 02/14/2025

2024 Form 1099-B
PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS
(Report details on Form 8949 or Schedule D)
OMB No. 1545-0715 (continued)

Disposition Transaction	Quantity (Box 1a)	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	D--Market Discount (DB) O--Option Premium W--Wash Sale Loss (W)	Realized Gain or (Loss)
Total				\$730,927.53	\$656,111.46		\$74,816.07

TAX LOT DEFAULT DISPOSITION METHOD:

Default Method for Mutual Funds: First In First Out
Default Method for Stocks in a Dividend Reinvestment: First In First Out
Default Method for all Other Securities: First In First Out
Unless otherwise noted by an *, all dispositions reported on this 1099-B were in accordance to the default disposition methods assigned to this account as of 12/31/2024:

IRS Form 1099-B--Proceeds from Broker and Barter Exchange Transactions:

The amounts in this section of your Tax Information Statement reflect proceeds from securities transactions such as sales, redemptions, tender offers, return of principal distributions, covered options and bond maturities. Short-term and long-term transactions are segregated in your 1099-B form in a format comparable to IRS Form 8949 for dispositions of covered and noncovered securities. Since your financial organization subscribes to our premium Tax and Year-End Statement, the date of acquisition, cost or other basis, type of gain or loss (short-term or long-term), whether any loss is disallowed due to a wash sale and market discount for both covered and noncovered securities transactions will be displayed when available. Such detail for noncovered transactions is not reported to the IRS.

Box 2--Type of Gain or Loss. The section headings within the 1099-B indicate the type of gain or loss for the transactions, short-term or long-term. An asterisk will denote when your security may be subject to special rules. For example, gain on a contingent payment debt instrument subject to the non-contingent bond method generally is treated as ordinary interest income rather than as a capital gain. See the instructions for Form 8949, Pub. 550, or Pub. 1212 for more details on whether there are any special rules or adjustments that might apply to your security.

Box 12--Covered or Box 5--Noncovered Security. The section headings within the 1099-B indicate whether your security transaction is or is not a covered security under the IRS cost basis reporting program. For tax return reporting purposes, you may need to adjust your cost basis information on IRS Form 8949 and Schedule D of IRS Form 1040. You may also need to consider tax reporting rules that a reporting financial organization is not required to use when preparing your Form 1099-B, such as when reporting wash sales. As a result, you must take into account all applicable tax return reporting rules and be able to verify, from your own records, all cost basis information that is reported on your tax return. The IRS requires you to maintain all such records in case you are asked to produce them. For gifted shares when the original cost is greater than the fair market value, if you elect to include these shares in the average calculation, you must instruct your investment professional in writing to move these shares from fair market value to the average calculation.

Box 1a--Description and Quantity. Shows a brief description of the item or service for which the proceeds are being reported, as well as the number of shares included in the sale or exchange for the lot reported. If fractional shares are part of the disposition, those shares will be displayed to four decimal places.

CUSIP. Broker transactions may show the Committee on Uniform Security Identification Procedures (CUSIP) number of the item reported.

Box 3--Qualified Opportunity Fund (QOF). This indicator will be displayed next to the CUSIP if the proceeds are from the disposition of a QOF.

Box 1b--Date Acquired. This box represents the date you acquired the security or, for short sales, the date you opened the short sale. You may see the word VARIOUS displayed in this column if the disposition transaction includes multiple lots with various acquisition dates.

Box 1c--Data Sold or Disposed. Shows the trade date of the sale or exchange. For short sales, the date shown is the date you closed the short sale.

Qualified Dividends and Capital Gain Tax Worksheet - Line 16

Keep for Your Records

Name(s) shown on return

Your SSN

MICHELLE T. MORLEY

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

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	<u>340,985.</u>	
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	<u>29,366.</u>	
3. Are you filing Schedule D?*			
☒ Yes. Enter the smaller of line 15 or line 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0-	3.	<u>82,367.</u>	
☐ No. Enter the amount from Form 1040 or 1040-SR, line 7.			
4. Add lines 2 and 3	4.	<u>111,733.</u>	
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	<u>229,252.</u>	
6. Enter:			
\$47,025 if single or married filing separately,			
\$94,050 if married filing jointly or qualifying surviving spouse,			
\$63,000 if head of household.	6.	<u>47,025.</u>	
7. Enter the smaller of line 1 or line 6	7.	<u>47,025.</u>	
8. Enter the smaller of line 5 or line 7	8.	<u>47,025.</u>	
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	<u>0.</u>	
10. Enter the smaller of line 1 or line 4	10.	<u>111,733.</u>	
11. Enter the amount from line 9	11.	<u>0.</u>	
12. Subtract line 11 from line 10	12.	<u>111,733.</u>	
13. Enter:			
\$518,900 if single,			
\$291,850 if married filing separately,			
\$583,750 if married filing jointly or qualifying surviving spouse,			
\$551,350 if head of household.	13.	<u>518,900.</u>	
14. Enter the smaller of line 1 or line 13	14.	<u>340,985.</u>	
15. Add lines 5 and 9	15.	<u>229,252.</u>	
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	<u>111,733.</u>	
17. Enter the smaller of line 12 or line 16	17.	<u>111,733.</u>	
18. Multiply line 17 by 15% (0.15)	18.	<u>16,760.</u>	
19. Add lines 9 and 17	19.	<u>111,733.</u>	
20. Subtract line 19 from line 10	20.	<u>0.</u>	
21. Multiply line 20 by 20% (0.20)	21.	<u>0.</u>	
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	<u>51,047.</u>	
23. Add lines 18, 21, and 22	23.	<u>67,807.</u>	
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	<u>89,720.</u>	
25. Tax on all taxable income. Enter the smaller of line 23 or line 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	<u>67,807.</u>	

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

Alternative Minimum Tax - Individuals

2024

Attachment
Sequence No. 32Department of the Treasury
Internal Revenue Service

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

Go to www.irs.gov/Form6251 for instructions and the latest information.

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

Your social security number

MICHELLE T. MORLEY

Part I Alternative Minimum Taxable Income

1	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract line 14 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	1	340,985.
2a	If filing Schedule A (Form 1040), enter the taxes from Schedule A, line 7; otherwise, enter the amount from Form 1040 or 1040-SR, line 12	2a	16,550.
b	Tax refund from Schedule 1 (Form 1040), line 1 or line 8z	2b	
c	Investment interest expense (difference between regular tax and AMT)	2c	
d	Depletion (difference between regular tax and AMT)	2d	
e	Net operating loss deduction from Schedule 1 (Form 1040), line 8a. Enter as a positive amount	2e	
f	Alternative tax net operating loss deduction	2f	
g	Interest from specified private activity bonds exempt from the regular tax SEE STATEMENT 12	2g	499.
h	Qualified small business stock, see instructions	2h	
i	Exercise of incentive stock options (excess of AMT income over regular tax income)	2i	
j	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	2j	
k	Disposition of property (difference between AMT and regular tax gain or loss)	2k	
l	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	2l	
m	Passive activities (difference between AMT and regular tax income or loss)	2m	
n	Loss limitations (difference between AMT and regular tax income or loss)	2n	
o	Circulation costs (difference between regular tax and AMT)	2o	
p	Long-term contracts (difference between AMT and regular tax income)	2p	
q	Mining costs (difference between regular tax and AMT)	2q	
r	Research and experimental costs (difference between regular tax and AMT)	2r	
s	Income from certain installment sales before January 1, 1987	2s	
t	Intangible drilling costs preference	2t	
3	Other adjustments, including income-based related adjustments	3	
4	Alternative minimum taxable income. Combine lines 1 through 3. (If married filing separately and line 4 is more than \$875,950, see instructions.)	4	358,034.

Part II Alternative Minimum Tax (AMT)

5	Exemption. IF your filing status is ... AND line 4 is not over ... THEN enter on line 5 ... Single or head of household \$609,350 \$85,700 Married filing jointly or qualifying surviving spouse 1,218,700 133,300 Married filing separately 609,350 66,650 If line 4 is over the amount shown above for your filing status, see instructions.	5	85,700.
6	Subtract line 5 from line 4. If more than zero, go to line 7. If zero or less, enter -0- here and on lines 7, 9, and 11, and go to line 10	6	272,334.
7	- If you are filing Form 2555, see instructions for the amount to enter. - If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; you reported qualified dividends on Form 1040 or 1040-SR, line 3a; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 40 here. All others: If line 6 is \$232,600 or less (\$116,300 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$4,652 (\$2,326 if married filing separately) from the result.	7	58,516.
8	Alternative minimum tax foreign tax credit (see instructions)	8	103.
9	Tentative minimum tax. Subtract line 8 from line 7	9	58,413.
10	Add Form 1040 or 1040-SR, line 16 (minus any tax from Form 4972), and Schedule 2 (Form 1040), line 1z. Subtract from the result Schedule 3 (Form 1040), line 1 and any negative amount reported on Form 8978, line 14 (treated as a positive number). If zero or less, enter -0-. If you used Schedule J to figure your tax on Form 1040 or 1040-SR, line 16, refigure that tax without using Schedule J before completing this line. See instructions	10	67,704.
11	AMT. Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 2	11	0.

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

Part III Tax Computation Using Maximum Capital Gains Rates

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

12	Enter the amount from Form 6251, line 6. If you are filing Form 2555, enter the amount from line 3 of the worksheet in the instructions for line 7	12	272,334.
13	Enter the amount from line 4 of the Qualified Dividends and Capital Gain Tax Worksheet in the Instructions for Form 1040 or the amount from line 13 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	13	111,733.
14	Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	14	
15	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 13. Otherwise, add lines 13 and 14, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555, see instructions for the amount to enter	15	111,733.
16	Enter the smaller of line 12 or line 15	16	111,733.
17	Subtract line 16 from line 12	17	160,601.
18	If line 17 is \$232,600 or less (\$116,300 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract \$4,652 (\$2,326 if married filing separately) from the result	18	41,756.
19	Enter: • \$94,050 if married filing jointly or qualifying surviving spouse, • \$47,025 if single or married filing separately, or • \$63,000 if head of household.	19	47,025.
20	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 14 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-	20	229,252.
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	0.
22	Enter the smaller of line 12 or line 13	22	111,733.
23	Enter the smaller of line 21 or line 22. This amount is taxed at 0%	23	0.
24	Subtract line 23 from line 22	24	111,733.
25	Enter: • \$518,900 if single, • \$291,850 if married filing separately, • \$583,750 if married filing jointly or qualifying surviving spouse, or • \$551,350 if head of household.	25	518,900.
26	Enter the amount from line 21	26	0.
27	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 21 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter	27	229,252.
28	Add line 26 and line 27	28	229,252.
29	Subtract line 28 from line 25. If zero or less, enter -0-	29	289,648.
30	Enter the smaller of line 24 or line 29	30	111,733.
31	Multiply line 30 by 15% (0.15)	31	16,760.
32	Add lines 23 and 30	32	111,733.
33	If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33. Subtract line 32 from line 22	33	0.
34	Multiply line 33 by 20% (0.20)	34	
35	If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35. Add lines 17, 32, and 33	35	
36	Subtract line 35 from line 12	36	
37	Multiply line 36 by 25% (0.25)	37	
38	Add lines 18, 31, 34, and 37	38	58,516.
39	If line 12 is \$232,600 or less (\$116,300 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract \$4,652 (\$2,326 if married filing separately) from the result	39	71,602.
40	Enter the smaller of line 38 or line 39 here and on line 7. If you are filing Form 2555, do not enter this amount on line 7. Instead, enter it on line 4 of the worksheet in the instructions for line 7	40	58,516.

Department of the Treasury
Internal Revenue ServiceAttach to your tax return.
Go to www.irs.gov/Form8995A for instructions and the latest information.

Name(s) shown on return

Your taxpayer identification number

MICHELLE T. MORLEY

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

Use this form if your taxable income, before your qualified business income deduction, is above \$191,950 (\$383,900 if married filing jointly), or you're a patron of an agricultural or horticultural cooperative.

Part I Trade, Business, or Aggregation Information

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

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

Part II Determine Your Adjusted Qualified Business Income

	A	B	C
2 Qualified business income from the trade, business, or aggregation. See instructions	2		
3 Multiply line 2 by 20% (0.20). If your taxable income is \$191,950 or less (\$383,900 if married filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13	3		
4 Allocable share of W-2 wages from the trade, business, or aggregation	4		
5 Multiply line 4 by 50% (0.50)	5		
6 Multiply line 4 by 25% (0.25)	6		
7 Allocable share of the unadjusted basis immediately after acquisition (UBIA) of all qualified property	7		
8 Multiply line 7 by 2.5% (0.025)	8		
9 Add lines 6 and 8	9		
10 Enter the greater of line 5 or line 9	10		
11 W-2 wage and UBIA of qualified property limitation. Enter the smaller of line 3 or line 10	11		
12 Phased-in reduction. Enter the amount from line 26, if any	12		
13 Qualified business income deduction before patron reduction. Enter the greater of line 11 or line 12	13		
14 Patron reduction. Enter the amount from Schedule D (Form 8995-A), line 6, if any. See instructions	14		
15 Qualified business income component. Subtract line 14 from line 13	15		
16 Total qualified business income component. Add all amounts reported on line 15	16		

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

Form **8995-A** (2024)

Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$191,950 but not \$241,950 (\$383,900 and \$483,900 if married filing jointly) and line 10 is less than line 3. Otherwise, skip Part III.

		A	B	C
17	Enter the amounts from line 3	17		
18	Enter the amounts from line 10	18		
19	Subtract line 18 from line 17	19		
20	Taxable income before qualified business income deduction	20		
21	Threshold. Enter \$191,950 (\$383,900 if married filing jointly)	21		
22	Subtract line 21 from line 20	22		
23	Phase-in range. Enter \$50,000 (\$100,000 if married filing jointly)	23		
24	Phase-in percentage. Divide line 22 by line 23	24	%	
25	Total phase-in reduction. Multiply line 19 by line 24	25		
26	Qualified business income after phase-in reduction. Subtract line 25 from line 17. Enter this amount here and on line 12, for the corresponding trade or business	26		

Part IV Determine Your Qualified Business Income Deduction

27	Total qualified business income component from all qualified trades, businesses, or aggregations. Enter the amount from line 16	27		
28	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions	28	390.	
29	Qualified REIT dividends and PTP (loss) carryforward from prior years	29	()	
30	Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0-	30	390.	
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	78.	
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		78.
33	Taxable income before qualified business income deduction	33	341,063.	
34	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	34	111,733.	
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		229,330.
36	Income limitation. Multiply line 35 by 20% (0.20)	36		45,866.
37	Qualified business income deduction before the domestic production activities deduction (DPAD) under section 199A(g). Enter the smaller of line 32 or line 36	37		78.
38	DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don't enter more than line 33 minus line 37	38		
39	Total qualified business income deduction. Add lines 37 and 38	39		78.
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40	()	

Form

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

OMB No. 1545-2227

2024Attachment
Sequence No. 72Department of the Treasury
Internal Revenue Service

Attach to your tax return.

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

Name(s) shown on your tax return

Your social security number or EIN

MICHELLE T. MORLEY**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	49,996.
2	Ordinary dividends (see instructions)		2	31,197.
3	Annuities (see instructions)		3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions)	4a		
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	
5a	Net gain or loss from disposition of property (see instructions)	5a	82,367.	
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	82,367.
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	163,560.

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	163,560.
Individuals:				
13	Modified adjusted gross income (see instructions)	13	357,613.	
14	Threshold based on filing status (see instructions)	14	200,000.	
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	157,613.	
16	Enter the smaller of line 12 or line 15		16	157,613.
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	5,989.
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	

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

Form 8960 (2024)

FORM 1040		WAGES RECEIVED AND TAXES WITHHELD				STATEMENT	
T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICAL TAX	
T STATE OF FLORIDA	164,731.	35,074.			10,453.	2,787.	
TOTALS	164,731.	35,074.			10,453.	2,787.	

FORM 1040		TAX-EXEMPT INTEREST	STATEMENT	
NAME OF PAYER			AMOUNT	
PERSHING LLC			2,738	
TOTAL TO FORM 1040, LINE 2A			2,738	

FORM 1040		QUALIFIED DIVIDENDS		STATEMENT	
NAME OF PAYER		ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS		
PERSHING LLC		31,197.	29,360		
TOTAL INCLUDED IN FORM 1040, LINE 3A			29,360		

FORM 1040

SOCIAL SECURITY BENEFITS WORKSHEET

STATEMENT

CHECK ONLY ONE BOX:

- X A. SINGLE, HEAD OF HOUSEHOLD, OR QUALIFYING SURVIVING SPOUSE
 B. MARRIED FILING JOINTLY
 C. MARRIED FILING SEPARATELY AND LIVED WITH YOUR SPOUSE
 AT ANY TIME DURING 2024
 D. MARRIED FILING SEPARATELY AND LIVED APART FROM YOUR SPOUSE
 FOR ALL OF 2024

1. ENTER THE TOTAL AMOUNT FROM BOX 5 OF ALL YOUR
 FORMS SSA-1099 AND RRB-1099. ALSO, ENTER THIS AMOUNT ON
 FORM 1040, LINE 6A 34,496
 IF YOU CHECKED BOX B: TAXPAYER AMOUNT
 SPOUSE AMOUNT
2. MULTIPLY LINE 1 BY 50% (0.50) 17,248
3. ADD THE AMOUNTS ON FORM 1040, LINES 1Z, 2A, 2B, 3B, 4B, 5B,
 7 AND 8. IF FILING FORM 8815, DON'T INCLUDE THE AMOUNT FROM
 LINE 2B. INSTEAD, USE THE AMOUNT FROM SCHEDULE B, LINE 2.
 DO NOT INCLUDE ANY AMOUNTS FROM BOX 5 OF FORMS SSA-1099 OR
 RRB-1099 331,029
4. ENTER THE AMOUNT OF ANY EXCLUSIONS FROM FOREIGN EARNED
 INCOME, FOREIGN HOUSING, INCOME FROM U.S. POSSESSIONS,
 OR INCOME FROM PUERTO RICO BY BONA FIDE RESIDENTS OF
 PUERTO RICO THAT YOU CLAIMED 348,277
5. ADD LINES 2, 3, AND 4 348,277
6. ADD THE AMOUNTS FROM SCHEDULE 1, LINES 11 THROUGH 20,
 AND 23 AND 25 25,000
7. SUBTRACT LINE 6 FROM LINE 5
8. ENTER: \$25,000 IF YOU CHECKED BOX A OR D, OR
 \$32,000 IF YOU CHECKED BOX B, OR
 \$-0- IF YOU CHECKED BOX C 323,277
9. IS THE AMOUNT ON LINE 8 LESS THAN THE AMOUNT ON LINE 7?
 [] NO. STOP. NONE OF YOUR SOCIAL SECURITY BENEFITS ARE
 TAXABLE. ENTER -0- ON FORM 1040, LINE 6B. IF YOU ARE
 MARRIED FILING SEPARATELY AND YOU LIVED APART FROM YOUR
 SPOUSE FOR ALL OF 2024, BE SURE YOU ENTERED 'D' TO THE
 RIGHT OF THE WORD "BENEFITS" ON LINE 6A.
 [X] YES. SUBTRACT LINE 8 FROM LINE 7 9,000
10. ENTER \$9,000 IF YOU CHECKED BOX A OR D,
 \$12,000 IF YOU CHECKED BOX B
 \$-0- IF YOU CHECKED BOX C 314,277
11. SUBTRACT LINE 10 FROM LINE 9. IF ZERO OR LESS, ENTER -0- 9,000
12. ENTER THE SMALLER OF LINE 9 OR LINE 10 4,500
13. ENTER ONE HALF OF LINE 12 4,500
14. ENTER THE SMALLER OF LINE 2 OR LINE 13 267,131
15. MULTIPLY LINE 11 BY 85% (.85). IF LINE 11 IS ZERO, ENTER -0- 271,631
16. ADD LINES 14 AND 15 29,322
17. MULTIPLY LINE 1 BY 85% (.85) 29,322
18. TAXABLE BENEFITS. ENTER THE SMALLER OF LINE 16 OR LINE 17
 * ALSO ENTER THIS AMOUNT ON FORM 1040, LINE 6B

STATEMENT(S)

FORM 1040	TAX	STATEMENT
DESCRIPTION		AMOUNT
FROM QUALIFIED DIVIDENDS AND CAPITAL GAIN WORKSHEET		67,807
TOTAL TO FORM 1040, LINE 16		67,807

FORM 1040	FEDERAL INCOME TAX WITHHELD - FORM(S) W-2	STATEMENT
T S DESCRIPTION		AMOUNT
T STATE OF FLORIDA		35,074
TOTAL TO FORM 1040, LINE 25A		35,074

FORM 1040	CURRENT YEAR ESTIMATES AND AMOUNT APPLIED FROM PREVIOUS YEAR	STATEMENT
DESCRIPTION		AMOUNT
1ST QTR ESTIMATE PAYMENT		3,000
2ND QTR ESTIMATE PAYMENT		3,000
3RD QTR ESTIMATE PAYMENT		3,000
4TH QTR ESTIMATE PAYMENT		3,000
TOTAL TO FORM 1040, LINE 26		12,000

SCHEDULE D	SHORT-TERM CAPITAL GAINS AND LOSSES				STATEMENT
DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST OR OTHER BASIS	GAIN OR LOSS
PERSHING LLC	VARIOUS	12/31/24	195,075.	199,103.	-4,028
TOTAL TO SCH D, LINE 1A			195,075.	199,103.	-4,028

SCHEDULE D		LONG-TERM CAPITAL GAINS AND LOSSES			STATEMENT
DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST OR OTHER BASIS	GAIN OR LOSS
PERSHING LLC	VARIOUS	12/31/24	535,852.	457,008.	78,844
TOTAL TO SCH D, LINE 8A			535,852.	457,008.	78,844

SCHEDULE D		CAPITAL GAIN DISTRIBUTIONS		STATEMENT	1
NAME OF PAYER		TOTAL CAPITAL GAIN	28% GAIN		
PERSHING LLC		4.			
TOTALS TO SCHEDULE D, LINE 13		4.			

SCHEDULE D

UNRECAPTURED SECTION 1250 GAIN

STATEMENT 1

1. IF YOU HAVE A SECTION 1250 PROPERTY IN PART III OF FORM 4797 FOR WHICH YOU MADE AN ENTRY IN PART I OF FORM 4797, ENTER THE SMALLER OF LINE 22 OR LINE 24 OF FORM 4797 FOR THAT PROPERTY. IF YOU DID NOT HAVE ANY SUCH PROPERTY, GO TO LINE 4
2. ENTER THE AMOUNT FROM FORM 4797, LINE 26G, FOR THE PROPERTY FOR WHICH YOU MADE AN ENTRY ON LINE 1
3. SUBTRACT LINE 2 FROM LINE 1
4. ENTER THE TOTAL UNRECAPTURED SECTION 1250 GAIN INCLUDED ON LINE 26 OR LINE 37 OF FORM(S) 6252 FROM INSTALLMENT SALES OF TRADE OR BUSINESS PROPERTY HELD MORE THAN 1 YEAR
5. ENTER THE TOTAL OF ANY AMOUNTS REPORTED TO YOU ON A SCHEDULE K-1 FROM A PARTNERSHIP OR AN S CORPORATION AS "UNRECAPTURED SECTION 1250 GAIN"
6. ADD LINES 3 THROUGH 5
7. ENTER THE SMALLER OF LINE 6 OR THE GAIN FROM FORM 4797, LINE 7
8. ENTER THE AMOUNT, IF ANY, FROM FORM 4797, LINE 8
9. SUBTRACT LINE 8 FROM LINE 7. IF ZERO OR LESS, ENTER -0-
10. ENTER THE AMOUNT OF ANY GAIN FROM THE SALE OR EXCHANGE OF AN INTEREST IN A PARTNERSHIP ATTRIBUTABLE TO UNRECAPTURED SECTION 1250 GAIN
11. ENTER THE TOTAL OF ANY AMOUNTS REPORTED TO YOU ON A SCHEDULE K-1, FORMS 1099-DIV, OR FORM 2439 AS "UNRECAPTURED SECTION 1250 GAIN" FROM AN ESTATE, TRUST, REAL ESTATE INVESTMENT TRUST, OR MUTUAL FUND (OR OTHER REGULATED INVESTMENT COMPANY) OR IN CONNECTION WITH A FORM 1099-R
12. ENTER THE TOTAL OF ANY UNRECAPTURED SECTION 1250 GAIN FROM SALES (INCLUDING INSTALLMENT SALES) OR OTHER DISPOSITIONS OF SECTION 1250 PROPERTY HELD MORE THAN 1 YEAR FOR WHICH YOU DID NOT MAKE AN ENTRY IN PART I OF FORM 4797 FOR THE YEAR OF SALE
13. ADD LINES 9 THROUGH 12
14. IF YOU HAD ANY SECTION 1202 GAIN OR COLLECTIBLE GAIN OR (LOSS), ENTER THE TOTAL OF LINES 1 THROUGH 4 OF THE 28% RATE GAIN WORKSHEET
15. ENTER THE (LOSS), IF ANY, FROM SCH D, LINE 7.
IF SCH D, LINE 7, IS ZERO OR A GAIN ENTER -0- -4,028.
16. ENTER YOUR LONG-TERM CAPITAL LOSS CARRYOVERS FROM SCHEDULE D, LINE 14, AND SCHEDULE K-1 (FORM 1041), BOX 11, CODE D
17. COMBINE LINES 14 THROUGH 16. IF THE RESULT IS A (LOSS), ENTER IT AS A POSITIVE AMOUNT. IF THE RESULT IS ZERO OR A GAIN, ENTER -0- 4,028
18. SUBTRACT LINE 17 FROM LINE 13. IF ZERO OR LESS, ENTER -0-. IF MORE THAN ZERO, ENTER THE RESULT HERE AND ON SCHEDULE D, LINE 19

MICHELLE T. MORLEY

FORM 6251 INTEREST FROM SPECIFIED PRIVATE ACTIVITY BONDS STATEMENT 1

DESCRIPTION

AMOUNT

PERSHING LLC

499

TOTAL TO FORM 6251, LINE 2G

499

MICHELLE T. MORLEY

FORM 8995-A	QUALIFIED REIT DIVIDENDS AND PTP INCOME	STATEMENT
NAME OF ENTITY/ACTIVITY	REIT DIVIDENDS	PTP INCOME
PERSHING LLC	390.	
TOTAL TO FORM 8995-A, LINE 28	390.	

STATEMENT(S)