

**Filing Status** ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS)  
☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial <b>George</b>		Last name <b>Jefferson</b>		Your social security number <b>500-00-1006</b>	
If joint return, spouse's first name and middle initial <b>Louise</b>		Last name <b>Jefferson</b>		Spouse's social security number <b>400-00-8006</b>	
Home address (number and street). If you have a P.O. box, see instructions. <b>185 E 85th Street</b>				Apt. no.	
City, town or post office. If you have a foreign address, also complete spaces below. <b>New York</b>			State <b>NY</b>		ZIP code <b>10028</b>
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

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? . . . . . ▶ ☐ 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, 1957 ☐ Are blind  
☐ **Spouse:** ☐ Was born before January 2, 1957 ☐ Is blind

<b>Dependents</b> (see instructions): (1) First name Last name		(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see instructions):	
				Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here ▶ <input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Attach Schedule B if required.	<b>1</b>	Wages, salaries, tips, etc. Attach Form(s) W-2 . . . . .	<b>1</b>	
	<b>2a</b>	Tax-exempt interest . . . . .	<b>2b</b>	1,000
	<b>3a</b>	Qualified dividends . . . . .	<b>3b</b>	3,000
	<b>4a</b>	IRA distributions . . . . .	<b>4b</b>	118,000
	<b>5a</b>	Pensions and annuities . . . . .	<b>5b</b>	36,000
	<b>6a</b>	Social security benefits . . . . .	<b>6b</b>	34,000
	<b>7</b>	Capital gain or (loss). Attach Schedule D if required. If not required, check here . . . . . ▶ <input type="checkbox"/>	<b>7</b>	15,500
	<b>8</b>	Other income from Schedule 1, line 10. . . . .	<b>8</b>	2,000
	<b>9</b>	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> . . . . . ▶	<b>9</b>	209,500
	<b>10</b>	Adjustments to income from Schedule 1, line 26 . . . . .	<b>10</b>	3,000
	<b>11</b>	Subtract line 10 from line 9. This is your <b>adjusted gross income</b> . . . . . ▶	<b>11</b>	206,500

**Standard Deduction**See *Standard Deduction Chart* on the last page of this form.

<b>12a</b>	<b>Standard deduction or itemized deductions</b> (from Schedule A) . . . . .	<b>12a</b>	26,450	
<b>b</b>	Charitable contributions if you take the standard deduction (see instructions) . . . . .	<b>12b</b>	600	
<b>c</b>	Add lines 12a and 12b . . . . .	<b>12c</b>		27,050
<b>13</b>	Qualified business income deduction from Form 8995 or Form 8995-A . . . . .	<b>13</b>		
<b>14</b>	Add lines 12c and 13 . . . . .	<b>14</b>		27,050
<b>15</b>	<b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0- . . . . .	<b>15</b>		179,450
<b>16</b>	<b>Tax</b> (see instructions). Check if any from:			
	1 <input type="checkbox"/> Form(s) 8814 2 <input type="checkbox"/> Form 4972 3 <input type="checkbox"/> _____ . . . . .	<b>16</b>		29,786
<b>17</b>	Amount from Schedule 2, line 3 . . . . .	<b>17</b>		
<b>18</b>	Add lines 16 and 17 . . . . .	<b>18</b>		29,786
<b>19</b>	Nonrefundable child tax credit or credit for other dependents from Schedule 8812 . . . . .	<b>19</b>		
<b>20</b>	Amount from Schedule 3, line 8 . . . . .	<b>20</b>		
<b>21</b>	Add lines 19 and 20 . . . . .	<b>21</b>		0
<b>22</b>	Subtract line 21 from line 18. If zero or less, enter -0- . . . . .	<b>22</b>		29,786
<b>23</b>	Other taxes, including self-employment tax, from Schedule 2, line 21 . . . . .	<b>23</b>		
<b>24</b>	Add lines 22 and 23. This is your <b>total tax</b> . . . . . ▶	<b>24</b>		29,786
<b>25</b>	Federal income tax withheld from:			
	<b>a</b> Form(s) W-2 . . . . .	<b>25a</b>		
	<b>b</b> Form(s) 1099 . . . . .	<b>25b</b>	6,000	
	<b>c</b> Other forms (see instructions) . . . . .	<b>25c</b>		
	<b>d</b> Add lines 25a through 25c . . . . .	<b>25d</b>		6,000
<b>26</b>	2021 estimated tax payments and amount applied from 2020 return . . . . .	<b>26</b>		
<b>27a</b>	<b>Earned income credit (EIC)</b> . . . . .	<b>27a</b>		
	Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18 to claim the EIC. See instructions . . . . . ▶ <input type="checkbox"/>			
	<b>b</b> Nontaxable combat pay election . . . . .	<b>27b</b>		
	<b>c</b> Prior year (2019) earned income . . . . .	<b>27c</b>		
<b>28</b>	Refundable child tax credit or additional child tax credit from Schedule 8812 . . . . .	<b>28</b>		
<b>29</b>	American opportunity credit from Form 8863, line 8 . . . . .	<b>29</b>		
<b>30</b>	Recovery rebate credit. See instructions . . . . .	<b>30</b>	0	
<b>31</b>	Amount from Schedule 3, line 15 . . . . .	<b>31</b>		
<b>32</b>	Add lines 27a and 28 through 31. These are your <b>total other payments and refundable credits</b> . . . . . ▶	<b>32</b>		0
<b>33</b>	Add lines 25d, 26, and 32. These are your <b>total payments</b> . . . . . ▶	<b>33</b>		6,000

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

<b>Refund</b>	<b>34</b>	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b> . . . . .	<b>34</b>	<b>0</b>
	<b>35a</b>	Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here . . . . . <input type="checkbox"/>	<b>35a</b>	<b>0</b>
Direct deposit? See instructions.	<b>b</b>	Routing number <input type="text"/>	<b>c</b>	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
	<b>d</b>	Account number <input type="text"/>		
	<b>36</b>	Amount of line 34 you want <b>applied to your 2022 estimated tax</b> . . . . .	<b>36</b>	
<b>Amount You Owe</b>	<b>37</b>	<b>Amount you owe.</b> Subtract line 33 from line 24. For details on how to pay, see instructions . . . . .	<b>37</b>	<b>24,203</b>
	<b>38</b>	Estimated tax penalty (see instructions) . . . . .	<b>38</b>	<b>417</b>

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

Designee's name  Phone no.  Personal identification number (PIN)

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

Joint return? See instructions. Keep a copy for your records.	Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
	Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
	Phone no.	Email address	<b>MovingOnUp@gmail.com</b>	

**Paid Preparer Use Only**

Preparer's signature	Date	PTIN	Check if: <input checked="" type="checkbox"/> Self-employed
Preparer's name <b>Andrew Panko, EA</b>	Date <b>01-23-2022</b>		Phone no. <b>732-352-3340</b>
Firm's name <b>Tenon Tax Preparation LLC</b>			Firm's EIN <b></b>
Firm's address <b>4 Mayling Ct Edison, NJ 08837</b>			

**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](http://www.irs.gov/Form1040) for instructions and the latest information.

OMB No. 1545-0074

**2021**Attachment  
Sequence No. **01**

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

George &amp; Louise Jefferson

Your social security number

500-00-1006

**Part I Additional Income**

<b>1</b>	Taxable refunds, credits, or offsets of state and local income taxes . . . . .	<b>1</b>	
<b>2a</b>	Alimony received . . . . .	<b>2a</b>	
<b>b</b>	Date of original divorce or separation agreement (see instructions) . . ▶		
<b>3</b>	Business income or (loss). Attach Schedule C . . . . .	<b>3</b>	
<b>4</b>	Other gains or (losses). Attach Form 4797 . . . . .	<b>4</b>	
<b>5</b>	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E . . . . .	<b>5</b>	2,000
<b>6</b>	Farm income or (loss). Attach Schedule F . . . . .	<b>6</b>	
<b>7</b>	Unemployment compensation . . . . .	<b>7</b>	
<b>8</b>	Other income:		
<b>a</b>	Net operating loss . . . . .	<b>8a</b>	( )
<b>b</b>	Gambling income . . . . .	<b>8b</b>	
<b>c</b>	Cancellation of debt . . . . .	<b>8c</b>	
<b>d</b>	Foreign earned income exclusion from Form 2555 . . . . .	<b>8d</b>	( )
<b>e</b>	Taxable Health Savings Account distribution . . . . .	<b>8e</b>	
<b>f</b>	Alaska Permanent Fund dividends . . . . .	<b>8f</b>	
<b>g</b>	Jury duty pay . . . . .	<b>8g</b>	
<b>h</b>	Prizes and awards . . . . .	<b>8h</b>	
<b>i</b>	Activity not engaged in for profit income . . . . .	<b>8i</b>	
<b>j</b>	Stock options . . . . .	<b>8j</b>	
<b>k</b>	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 . . . . .	<b>8k</b>	
<b>l</b>	Olympic and Paralympic medals and USOC prize money (see instructions) . . . . .	<b>8l</b>	
<b>m</b>	Section 951(a) inclusion (see instructions) . . . . .	<b>8m</b>	
<b>n</b>	Section 951A(a) inclusion (see instructions) . . . . .	<b>8n</b>	
<b>o</b>	Section 461(l) excess business loss adjustment . . . . .	<b>8o</b>	
<b>p</b>	Taxable distributions from an ABLE account (see instructions) . . . . .	<b>8p</b>	
<b>z</b>	Other income. List type and amount ▶	<b>8z</b>	
<b>9</b>	Total other income. Add lines 8a through 8z . . . . .	<b>9</b>	
<b>10</b>	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR line 8 . . . . .	<b>10</b>	2,000

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

Schedule 1 (Form 1040) 2021

**Part II Adjustments to Income**

<b>11</b>	Educator expenses . . . . .	<b>11</b>	
<b>12</b>	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 . . . . .	<b>12</b>	
<b>13</b>	Health savings account deduction. Attach Form 8889 . . . . .	<b>13</b>	3,000
<b>14</b>	Moving expenses for members of the Armed Forces. Attach Form 3903 . . . . .	<b>14</b>	
<b>15</b>	Deductible part of self-employment tax. Attach Schedule SE . . . . .	<b>15</b>	
<b>16</b>	Self-employed SEP, SIMPLE, and qualified plans . . . . .	<b>16</b>	
<b>17</b>	Self-employed health insurance deduction . . . . .	<b>17</b>	
<b>18</b>	Penalty on early withdrawal of savings . . . . .	<b>18</b>	
<b>19a</b>	Alimony paid . . . . .	<b>19a</b>	
<b>b</b>	Recipient's SSN . . . . . ▶		
<b>c</b>	Date of original divorce or separation agreement (see instructions) . . ▶		
<b>20</b>	IRA deduction . . . . .	<b>20</b>	
<b>21</b>	Student loan interest deduction . . . . .	<b>21</b>	
<b>22</b>	Reserved for future use . . . . .	<b>22</b>	
<b>23</b>	Archer MSA deduction . . . . .	<b>23</b>	
<b>24</b>	Other adjustments:		
<b>a</b>	Jury duty pay (see instructions) . . . . .	<b>24a</b>	
<b>b</b>	Deductible expenses related to income reported on line 8k from the rental of personal property engaged in for profit . . . . .	<b>24b</b>	
<b>c</b>	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8l . . . . .	<b>24c</b>	
<b>d</b>	Reforestation amortization and expenses . . . . .	<b>24d</b>	
<b>e</b>	Repayment of supplemental unemployment benefits under the Trade Act of 1974 . . . . .	<b>24e</b>	
<b>f</b>	Contributions to section 501(c)(18)(D) pension plans . . . . .	<b>24f</b>	
<b>g</b>	Contributions by certain chaplains to section 403(b) plans . . . . .	<b>24g</b>	
<b>h</b>	Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions) . . . . .	<b>24h</b>	
<b>i</b>	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 . . . . .	<b>24i</b>	
<b>j</b>	Housing deduction from Form 2555 . . . . .	<b>24j</b>	
<b>k</b>	Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041) . . . . .	<b>24k</b>	
<b>z</b>	Other adjustments. List type and amount ▶	<b>24z</b>	
<b>25</b>	Total other adjustments. Add lines 24a through 24z . . . . .	<b>25</b>	
<b>26</b>	Add lines 11 through 23 and 25. These are your <b>adjustments to income</b> . Enter here and on Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a . . . . .	<b>26</b>	3,000

**SCHEDULE B  
(Form 1040)**Department of the Treasury  
Internal Revenue Service (99)**Interest and Ordinary Dividends**► Go to [www.irs.gov/ScheduleB](http://www.irs.gov/ScheduleB) for instructions and the latest information.

► Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

**2021**Attachment  
Sequence No. **08**

Name(s) shown on return

**George & Louise Jefferson**

Your social security number

**500-00-1006****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.

		Amount
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 ►	
	<b>Bank ABC</b>	<b>1,000</b>
	<b>INTEREST SUBTOTAL</b>	<b>1,000</b>
2	Add the amounts on line 1 . . . . .	<b>1,000</b>
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 . . . . . ►	<b>1,000</b>

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

		Amount
5	List name of payer ► <b>TD Ameritrade</b>	<b>3,000</b>
	<b>DIVIDEND SUBTOTAL</b>	<b>3,000</b>
6	Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b . . . . . ►	<b>3,000</b>

**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. See  
instructions.

	Yes	No
7a		
At any time during 2021, 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 . . . . .		<b>X</b>
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, enter the name of the foreign country where the financial account is located ►		
8		
During 2021, 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 . . . . .		<b>X</b>

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

EEA

**Schedule B (Form 1040) 2021**

**SCHEDULE D**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Capital Gains and Losses**

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

▶ Go to [www.irs.gov/ScheduleD](http://www.irs.gov/ScheduleD) for instructions and the latest information.

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

OMB No. 1545-0074

**2021**

Attachment  
Sequence No. **12**

Name(s) shown on return

**George & Louise Jefferson**

Your social security number

**500-00-1006**

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)
<b>1a</b> 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. . . .				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .	<b>2,000</b>	<b>1,500</b>		<b>500</b>
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .				
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .				
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824. . . . .			<b>4</b>	
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .			<b>5</b>	
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .			<b>6</b>	( )
<b>7</b> <b>Net short-term capital gain or (loss).</b> 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 . . . . .			<b>7</b>	<b>500</b>

**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)
<b>8a</b> 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 . . . .				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .	<b>50,000</b>	<b>40,000</b>		<b>10,000</b>
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .				
<b>11</b> 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 . . . . .			<b>11</b>	
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .			<b>12</b>	
<b>13</b> Capital gain distributions. See the instructions . . . . .			<b>13</b>	<b>5,000</b>
<b>14</b> Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .			<b>14</b>	( )
<b>15</b> <b>Net long-term capital gain or (loss).</b> Combine lines 8a through 14 in column (h). Then, go to Part III on page 2 . . . . .			<b>15</b>	<b>15,000</b>

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

Schedule D (Form 1040) 2021

**Part III Summary**

<b>16</b>	Combine lines 7 and 15 and enter the result . . . . .	<b>16</b>	<b>15,500</b>
	<ul style="list-style-type: none"> <li>• If line 16 is a <b>gain</b>, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.</li> <li>• If line 16 is a <b>loss</b>, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.</li> <li>• If line 16 is <b>zero</b>, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.</li> </ul>		
<b>17</b>	Are lines 15 and 16 <b>both</b> gains? <input checked="" type="checkbox"/> <b>Yes.</b> Go to line 18. <input type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.		
<b>18</b>	If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet . . . . . ▶	<b>18</b>	
<b>19</b>	If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet . . . . . ▶	<b>19</b>	
<b>20</b>	Are lines 18 and 19 both zero or blank and are you not filing Form 4952? <input checked="" type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16. <b>Don't</b> complete lines 21 and 22 below.  <input type="checkbox"/> <b>No.</b> Complete the <b>Schedule D Tax Worksheet</b> in the instructions. <b>Don't</b> complete lines 21 and 22 below.		
<b>21</b>	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the <b>smaller</b> of: <ul style="list-style-type: none"> <li>• The loss on line 16; or</li> <li>• (\$3,000), or if married filing separately, (\$1,500) ] . . . . . ▶</li> </ul> <b>Note:</b> When figuring which amount is smaller, treat both amounts as positive numbers.	<b>21</b>	( )
<b>22</b>	Do you have qualified dividends on Form 1040, 1040-SR, 1040-NR, line 3a?  <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16.  <input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.		



**Sales and Other Dispositions of Capital Assets**► Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.

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

**2021**Attachment  
Sequence No. **12A**

Name(s) shown on return

**George & Louise Jefferson**

Social security number or taxpayer identification number

**500-00-1006**

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the <b>Note</b> below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). <b>See the separate instructions.</b>		(h) <b>Gain or (loss).</b> Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	<b>Sale of VTSAX - Short Term</b>	<b>01-01-2021</b>	<b>12-15-2021</b>	<b>2,000</b>	<b>1,500</b>			<b>500</b>
<b>2 Totals.</b>	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, <b>line 1b</b> (if <b>Box A</b> above is checked), <b>line 2</b> (if <b>Box B</b> above is checked), or <b>line 3</b> (if <b>Box C</b> above is checked) ►			<b>2,000</b>	<b>1,500</b>			<b>500</b>

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

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

Form **8949** (2021)

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side **Social security number or taxpayer identification number****George & Louise Jefferson****500-00-1006**

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

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

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the <b>Note</b> below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). <b>See the separate instructions.</b>		(h) <b>Gain or (loss).</b> Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	<b>Sale of VTSAX - Long Term</b>	<b>01-01-2018</b>	<b>12-15-2021</b>	<b>50,000</b>	<b>40,000</b>			<b>10,000</b>
<b>2 Totals.</b>	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, <b>line 8b</b> (if <b>Box D</b> above is checked), <b>line 9</b> (if <b>Box E</b> above is checked), or <b>line 10</b> (if <b>Box F</b> above is checked) ►			<b>50,000</b>	<b>40,000</b>			<b>10,000</b>

**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 (99)

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](http://www.irs.gov/ScheduleE) for instructions and the latest information.

OMB No. 1545-0074

**2021**Attachment  
Sequence No. **13****George & Louise Jefferson**

Your social security number

**500-00-1006****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 2021 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

<b>1a</b>	Physical address of each property (street, city, state, ZIP code)				
<b>A</b>	<b>13402 Guy R Brewer Boulevard, Jamaica, NY 11434</b>				
<b>B</b>					
<b>C</b>					
<b>1b</b>	Type of Property (from list below)	<b>2</b> For each rental real estate property listed above, report the number of fair rental and personal use days. Check the <b>QJV</b> box only if you meet the requirements to file as a qualified joint venture. See instructions.	<b>Fair Rental Days</b>	<b>Personal Use Days</b>	<b>QJV</b>
<b>A</b>	<b>4</b>		<b>A 365</b>	<b>0</b>	<input type="checkbox"/>
<b>B</b>			<b>B</b>		<input type="checkbox"/>
<b>C</b>			<b>C</b>		<input type="checkbox"/>

**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) |

<b>Income:</b>	<b>Properties:</b>	<b>A</b>	<b>B</b>	<b>C</b>
<b>3</b> Rents received . . . . .	<b>3</b>	<b>30,000</b>		
<b>4</b> Royalties received . . . . .	<b>4</b>			
<b>Expenses:</b>				
<b>5</b> Advertising . . . . .	<b>5</b>			
<b>6</b> Auto and travel (see instructions) . . . . .	<b>6</b>			
<b>7</b> Cleaning and maintenance . . . . .	<b>7</b>			
<b>8</b> Commissions . . . . .	<b>8</b>			
<b>9</b> Insurance . . . . .	<b>9</b>	<b>1,000</b>		
<b>10</b> Legal and other professional fees . . . . .	<b>10</b>	<b>2,000</b>		
<b>11</b> Management fees . . . . .	<b>11</b>			
<b>12</b> Mortgage interest paid to banks, etc. (see instructions)	<b>12</b>			
<b>13</b> Other interest . . . . .	<b>13</b>			
<b>14</b> Repairs . . . . .	<b>14</b>	<b>5,000</b>		
<b>15</b> Supplies . . . . .	<b>15</b>			
<b>16</b> Taxes . . . . .	<b>16</b>	<b>10,000</b>		
<b>17</b> Utilities . . . . .	<b>17</b>	<b>10,000</b>		
<b>18</b> Depreciation expense or depletion . . . . .	<b>18</b>			
<b>19</b> Other (list) ▶ . . . . .	<b>19</b>			
<b>20</b> Total expenses. Add lines 5 through 19 . . . . .	<b>20</b>	<b>28,000</b>		
<b>21</b> 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 <b>Form 6198</b> . . . . .	<b>21</b>	<b>2,000</b>		
<b>22</b> Deductible rental real estate loss after limitation, if any, on <b>Form 8582</b> (see instructions) . . . . .	<b>22</b>	( ) ( ) ( )		
<b>23a</b> Total of all amounts reported on line 3 for all rental properties . . . . .	<b>23a</b>	<b>30,000</b>		
<b>b</b> Total of all amounts reported on line 4 for all royalty properties. . . . .	<b>23b</b>	<b>0</b>		
<b>c</b> Total of all amounts reported on line 12 for all properties . . . . .	<b>23c</b>	<b>0</b>		
<b>d</b> Total of all amounts reported on line 18 for all properties . . . . .	<b>23d</b>	<b>0</b>		
<b>e</b> Total of all amounts reported on line 20 for all properties . . . . .	<b>23e</b>	<b>28,000</b>		
<b>24</b> <b>Income.</b> Add positive amounts shown on line 21. <b>Do not</b> include any losses . . . . .	<b>24</b>		<b>2,000</b>	
<b>25</b> <b>Losses.</b> Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here . . . . .	<b>25</b>	( )	<b>0</b>	
<b>26</b> <b>Total rental real estate and royalty income or (loss).</b> Combine lines 24 and 25. Enter the result here. If Parts II, III, 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 .	<b>26</b>		<b>2,000</b>	

For Paperwork Reduction Act Notice, see the separate instructions.

Schedule E (Form 1040) 2021

Form	8606	Nondeductible IRAs		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service (99)		▶ Go to <a href="http://www.irs.gov/Form8606">www.irs.gov/Form8606</a> for instructions and the latest information.		2021
		▶ Attach to 2021 Form 1040, 1040-SR, or 1040-NR.		Attachment Sequence No. 48
Name. If married, file a separate form for each spouse required to file 2021 Form 8606. See instructions.			Your social security number	
Louise Jefferson			400-00-8006	
Fill in Your Address Only if You Are Filing This Form by Itself and Not With Your Tax Return	Home address (number and street, or P.O. box if mail is not delivered to your home)		Apt. no.	
	City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below (see instructions).			
	Foreign country name		Foreign province/state/county	
		Foreign postal code		
Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs				
Complete this part only if one or more of the following apply.				
<ul style="list-style-type: none"><li>You made nondeductible contributions to a traditional IRA for 2021.</li><li>You took distributions from a traditional, SEP, or SIMPLE IRA in 2021 and you made nondeductible contributions to a traditional IRA in 2021 or an earlier year. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution (see 2021 Forms 8915-D and 8915-F)), qualified charitable distribution, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.</li><li>You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2021 and you made nondeductible contributions to a traditional IRA in 2021 or an earlier year.</li></ul>				
1	Enter your nondeductible contributions to traditional IRAs for 2021, including those made for 2021 from January 1, 2022, through April 18, 2022. See instructions . . . . .			1
2	Enter your total basis in traditional IRAs. See instructions . . . . .			2 10,000
3	Add lines 1 and 2 . . . . .			3 10,000
<div>In 2021, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion?</div> <div>No → Enter the amount from line 3 on line 14. Do not complete the rest of Part I.</div> <div>Yes → Go to line 4.</div>				
4	Enter those contributions included on line 1 that were made from January 1, 2022, through April 18, 2022 . . . . .			4
5	Subtract line 4 from line 3 . . . . .			5 10,000
6	Enter the value of all your traditional, SEP, and SIMPLE IRAs as of December 31, 2021, plus any outstanding rollovers. Subtract any repayments of qualified disaster distributions (see 2021 Forms 8915-D and 8915-F) . . . . .			6 400,000
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2021. Do not include rollovers (other than repayments of qualified disaster distributions (see 2021 Forms 8915-D and 8915-F)), qualified charitable distributions, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions) . . . . .			7
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2021. Also, enter this amount on line 16 . . . . .			8 100,000
9	Add lines 6, 7, and 8 . . . . .			9 500,000
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000" . . . . .			10 x0.0200000
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also, enter this amount on line 17 . . . . .			11 2,000
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA . . . . .			12
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions . . . . .			13 2,000
14	Subtract line 13 from line 3. This is your total basis in traditional IRAs for 2021 and earlier years . . . . .			14 8,000
15a	Subtract line 12 from line 7 . . . . .			15a
b	Enter the amount on line 15a attributable to qualified disaster distributions from 2021 Forms 8915-D and 8915-F (see instructions). Also, enter this amount on 2021 Form 8915-D, line 23; or 2021 Form 8915-F, line 18, as applicable . . . . .			15b
c	Taxable amount. Subtract line 15b from line 15a. If more than zero, also include this amount on 2021 Form 1040, 1040-SR, or 1040-NR, line 4b . . . . .			15c
Note: You may be subject to an additional 10% tax on the amount on line 15c if you were under age 59 1/2 at the time of the distribution. See instructions.				

**Part II 2021 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs**

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2021.

<b>16</b>	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2021 . . . . .	<b>16</b>	<b>100,000</b>
<b>17</b>	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions) . . . . .	<b>17</b>	<b>2,000</b>
<b>18</b>	<b>Taxable amount.</b> Subtract line 17 from line 16. If more than zero, also include this amount on 2021 Form 1040, 1040-SR, or 1040-NR, line 4b . . . . .	<b>18</b>	<b>98,000</b>

**Part III Distributions From Roth IRAs**

Complete this part only if you took a distribution from a Roth IRA in 2021. For this purpose, a distribution does not include a rollover (other than a repayment of a qualified disaster distribution (see 2021 Forms 8915-D and 8915-F)), qualified charitable distribution, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

<b>19</b>	Enter your total nonqualified distributions from Roth IRAs in 2021, including any qualified first-time homebuyer distributions, and any qualified disaster distributions (see instructions). Also, see 2021 Forms 8915-D and 8915-F . . . . .	<b>19</b>	
<b>20</b>	Qualified first-time homebuyer expenses (see instructions). <b>Do not</b> enter more than \$10,000 reduced by the total of all your prior qualified first-time homebuyer distributions . . . . .	<b>20</b>	
<b>21</b>	Subtract line 20 from line 19. If zero or less, enter -0- . . . . .	<b>21</b>	
<b>22</b>	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, <b>stop here</b> . . . . .	<b>22</b>	
<b>23</b>	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions) . . . . .	<b>23</b>	
<b>24</b>	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA. See instructions . . . . .	<b>24</b>	
<b>25a</b>	Subtract line 24 from line 23. If zero or less, enter -0- and skip lines 25b and 25c . . . . .	<b>25a</b>	
<b>b</b>	Enter the amount on line 25a attributable to qualified disaster distributions from 2021 Forms 8915-D and 8915-F (see instructions). Also, enter this amount on 2021 Form 8915-D, line 24; <b>or</b> 2021 Form 8915-F, line 19, as applicable . . . . .	<b>25b</b>	
<b>c</b>	<b>Taxable amount.</b> Subtract line 25b from line 25a. If more than zero, also include this amount on 2021 Form 1040, 1040-SR, <b>or</b> 1040-NR, line 4b . . . . .	<b>25c</b>	

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

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



Your signature



Date

**Paid Preparer Use Only**

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Print/Type preparer's name

Firm's name ▶

Firm's EIN ▶

Firm's address ▶

Phone no.

# Health Savings Accounts (HSAs)

OMB No. 1545-0074

**2021**

Attachment  
Sequence No. **52**

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

▶ **Go to [www.irs.gov/Form8889](http://www.irs.gov/Form8889) for instructions and the latest information.**

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

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions ▶ **400-00-8006**

**George & Louise Jefferson**

**Before you begin:** Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required.

**Part I HSA Contributions and Deduction.** See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse.

1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2021. See instructions . . . . . ▶	<input checked="" type="checkbox"/> Self-only	<input type="checkbox"/> Family
2	HSA contributions you made for 2021 (or those made on your behalf), including those made from January 1, 2022, through April 15, 2022, that were for 2021. <b>Do not</b> include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions . . . . .	2	3,000
3	If you were under age 55 at the end of 2021 and, on the first day of <b>every</b> month during 2021, you were, or were considered, an eligible individual with the <b>same</b> coverage, enter \$3,600 (\$7,200 for family coverage). <b>All others</b> , see the instructions for the amount to enter . . . . .	3	4,600
4	Enter the amount you and your employer contributed to your Archer MSAs for 2021 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2021, also include any amount contributed to your spouse's Archer MSAs . . . . .	4	
5	Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	5	4,600
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2021, see the instructions for the amount to enter . . . . .	6	4,600
7	If you were age 55 or older at the end of 2021, married, and you or your spouse had family coverage under an HDHP at any time during 2021, enter your additional contribution amount. See instructions . . . . .	7	
8	Add lines 6 and 7 . . . . .	8	4,600
9	Employer contributions made to your HSAs for 2021 . . . . .	9	
10	Qualified HSA funding distributions . . . . .	10	
11	Add lines 9 and 10 . . . . .	11	
12	Subtract line 11 from line 8. If zero or less, enter -0- . . . . .	12	4,600
13	<b>HSA deduction.</b> Enter the <b>smaller</b> of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13 . . . . .	13	3,000

**Caution:** If line 2 is more than line 13, you may have to pay an additional tax. See instructions.

**Part II HSA Distributions.** If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part II for each spouse.

14a	Total distributions you received in 2021 from all HSAs (see instructions) . . . . .	14a	7,200
b	Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions . . . . .	14b	
c	Subtract line 14b from line 14a . . . . .	14c	7,200
15	Qualified medical expenses paid using HSA distributions (see instructions) . . . . .	15	7,200
16	<b>Taxable HSA distributions.</b> Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8e . . . . .	16	0
17a	If any of the distributions included on line 16 meet any of the <b>Exceptions to the Additional 20% Tax</b> (see instructions), check here . . . . . ▶ <input type="checkbox"/>		
b	<b>Additional 20% tax</b> (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c . . . . .	17b	

**Part III Income and Additional Tax for Failure To Maintain HDHP Coverage.** See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse.

18	Last-month rule . . . . .	18	
19	Qualified HSA funding distribution . . . . .	19	
20	<b>Total income.</b> Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8z, and enter "HSA" and the amount on the dotted line . . . . .	20	
21	<b>Additional tax.</b> Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d . . . . .	21	

(This page is not filed with the return. It is for your records only.)

Tax ID Number

Name(s) as shown on return

George & Louise Jefferson

500-00-1006

1099 LST.LD

Worksheet 1  
Forms 1040Social Security Benefits Worksheet  
Figuring Your Taxable Benefits

(Keep for your records)

2021

Name(s) as shown on return

Tax ID Number

George &amp; Louise Jefferson

500-00-1006

## Before you begin:

- If you are married filing separately and you **lived apart** from your spouse for all of 2021, enter "D" to the right of the word "benefits" on Form 1040 or 1040-SR, line 6a.
- Don't use this worksheet if you repaid benefits in 2021 and your total repayments (box 4 of Forms SSA-1099 and RRB-1099) were more than your gross benefits for 2021 (box 3 of Forms SSA-1099 and RRB-1099). None of your benefits are taxable for 2021. For more information, see Repayments More Than Gross Benefits.
- If you are filing Form 8815, Exclusion of Interest From Series EE and I U.S. Savings Bonds Issued After 1989, don't include the amount from line 2b of Form 1040 or 1040-SR on line 3 of this worksheet. Instead, include the amount from Schedule B (Form 1040 or 1040-SR), line 2.

1. Enter the total amount from **box 5 of ALL your Forms SSA-1099 and RRB-1099**.Also, enter this amount on Form 1040 or 1040-SR, line 6a . . . . . 1. 40,0002. Multiply line 1 by 50% (0.50) . . . . . 2. 20,0003. Combine the amounts from Form 1040 or 1040-SR, lines 1, 2b, 3b, 4b, 5b, 7, and 8 . . . . . 3. 175,5004. Enter the amount, if any, from Form 1040 or 1040-SR, line 2a . . . . . 4. 

## 5. Enter the total of any exclusions/adjustments for:

- Adoption benefits (Form 8839, line 28),
- Foreign earned income or housing (Form 2555, lines 45 and 50), and
- Certain income of bona fide residents of American Samoa (Form 4563, line 15) or Puerto Rico . . . . . 5.

6. Combine lines 2, 3, 4, and 5 . . . . . 6. 195,5007. Enter the amounts from Form 1040 or 1040-SR, Schedule 1, lines 11 through 20, and 23 and 25 . . . . . 7. 3,000

## 8. Is the amount on line 7 less than the amount on line 6?

**No. STOP** None of your social security benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b.**X Yes.** Subtract line 7 from line 6 . . . . . 8. 192,500

## 9. If you are:

- Married filing jointly, enter \$32,000
- Single, head of household, qualifying widow(er), or married filing separately and you **lived apart** from your spouse for all of 2021, enter \$25,000 . . . . . 9. 32,000

**Note.** If you are married filing separately and you lived with your spouse at any time in 2021, skip lines 9 through 16; multiply line 8 by 85% (0.85) and enter the result on line 17. Then, go to line 18.

## 10. Is the amount on line 9 less than the amount on line 8?

**No. STOP** None of your benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b. If you are married filing separately and you **lived apart** from your spouse for all of 2021, be sure you entered "D" to the right of the word "benefits" on line 6a.**X Yes.** Subtract line 9 from line 8 . . . . . 10. 160,50011. Enter \$12,000 if married filing jointly; \$9,000 if single, head of household, qualifying widow(er), or married filing separately and you **lived apart** from your spouse for all of 2021 . . . . . 11. 12,00012. Subtract line 11 from line 10. If zero or less, enter -0- . . . . . 12. 148,50013. Enter the **smaller** of line 10 or line 11 . . . . . 13. 12,00014. Multiply line 13 by 50% (0.50) . . . . . 14. 6,00015. Enter the **smaller** of line 2 or line 14 . . . . . 15. 6,00016. Multiply line 12 by 85% (0.85). If line 12 is zero, enter -0- . . . . . 16. 126,22517. Add lines 15 and 16 . . . . . 17. 132,22518. Multiply line 1 by 85% (0.85) . . . . . 18. 34,00019. **Taxable benefits.** Enter the **smaller** of line 17 or line 18. Also enter this amount on Form 1040 or 1040-SR, line 6b . . . . . 19. 34,000

## TIP

If you received a lump-sum payment in 2021 that was for an earlier year, also complete Worksheet 2 or 3 and Worksheet 4 to see if you can report a lower taxable benefit.



# Computation of Regular Tax

(This page is not filed with the return. It is for your records only.)

2021

Name(s) as shown on return

Tax ID Number

George & Louise Jefferson

500-00-1006

## Statement for line 16 of Form 1040-SR

### Tax Rate Schedule for Married Filing Joint Filing Status

If taxable income is					of the
over	but not over	pay	plus	% on excess	amount over
0	19,900	0.00		10%	0
19,900	81,050	1,990.00		12%	19,900
81,050	172,750	9,328.00		22%	81,050
<b>172,750</b>	<b>329,850</b>	<b>29,502.00</b>		<b>24%</b>	<b>172,750</b>
329,850	418,850	67,206.00		32%	329,850
418,850	628,300	95,686.00		35%	418,850
628,300	. . . . .	168,993.50		37%	628,300

$\$29,502.00 + ((\$179,450.00 - \$172,750.00) \times 24.0\%) = \$31,110$

Tax from Tax Rate Schedule \$ 31,110

Tax from Qualified Dividends/Capital Gain Worksheet \$ 29,786

\$ 29,786 Tax computed using the most advantageous method allowed

# Qualified Dividends and Capital Gain Tax Worksheet - Line 16 (Form 1040)

(Keep for your records)

**2021**

Name(s) as shown on return

Tax ID Number

**George & Louise Jefferson**

**500-00-1006**

**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.	179,450
2. Enter the amount from Form 1040 or 1040-SR, line 3a* . . . . .	2.	2,000
3. Are you filing Schedule D? <input checked="" type="checkbox"/> <b>Yes.</b> Enter the <b>smaller</b> of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or a loss, enter -0-. <input type="checkbox"/> <b>No.</b> Enter the amount from Form 1040 or 1040-SR, line 7.	3.	15,000
4. Add lines 2 and 3 . . . . .	4.	17,000
5. Subtract line 4 from line 1. If zero or less, enter -0- . . . . .	5.	162,450
6. Enter: \$40,400 if single or married filing separately, \$80,800 if married filing jointly or qualifying widow(er), \$54,100 if head of household.	6.	80,800
7. Enter the smaller of line 1 or line 6 . . . . .	7.	80,800
8. Enter the smaller of line 5 or line 7 . . . . .	8.	80,800
9. Subtract line 8 from line 7. This amount is taxed at 0% . . . . .	9.	
10. Enter the smaller of line 1 or line 4 . . . . .	10.	17,000
11. Enter the amount from line 9 . . . . .	11.	
12. Subtract line 11 from line 10 . . . . .	12.	17,000
13. Enter: \$445,850 if single, \$250,800 if married filing separately, \$501,600 if married filing jointly or qualifying widow(er), \$473,750 if head of household.	13.	501,600
14. Enter the smaller of line 1 or line 13 . . . . .	14.	179,450
15. Add lines 5 and 9 . . . . .	15.	162,450
16. Subtract line 15 from line 14. If zero or less, enter -0- . . . . .	16.	17,000
17. Enter the smaller of line 12 or line 16 . . . . .	17.	17,000
18. Multiply line 17 by 15% (0.15) . . . . .	18.	2,550
19. Add lines 9 and 17 . . . . .	19.	17,000
20. Subtract line 19 from line 10 . . . . .	20.	
21. Multiply line 20 by 20% (0.20) . . . . .	21.	
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.	27,236
23. Add lines 18, 21, and 22 . . . . .	23.	29,786
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.	31,110
25. <b>Tax on all taxable income.</b> Enter the <b>smaller</b> of line 23 or 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet . . . . .	25.	29,786

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

# Worksheet for Form 2210, Part III, Section B - Figure the Penalty

(Keep for your records)

**2021**

Name(s) as shown on return

Tax ID Number

**George & Louise Jefferson**

**500-00-1006**

Complete Rate Period 1 of each column before going to the next column; then go to Rate Periods 2, 3, and 4 in the same manner. If multiple estimated tax payments are applied to the underpayment amount in a column of line 1a, you'll need to make more than one computation for that column.

		Payment Due Dates			
		(a) 04/15/21	(b) 06/15/21	(c) 09/15/21	(d) 01/15/22
<b>1a</b> Enter your underpayment from Part III, Section A, line 17 . . . . .	<b>1a</b>	5,202	6,702	6,702	6,702
<b>1b</b> Date and amount of each payment applied to the underpayment in the same column. Don't enter more than the underpayment amount on line 1a for each column (see instructions). <b>Note.</b> Your payments are applied in the order made first to any underpayment balance in an earlier column until that underpayment is fully paid.	01-15-2022				
	1,500				
	09-15-2021				
	1,500				
	06-15-2021	04-15-2022	04-15-2022	04-15-2022	04-15-2022
<b>1b</b>	1,500	6,702	6,702	6,702	6,702
<b>Rate Period 1: April 16, 2021 - June 30, 2021</b>					
<b>2</b> Computation starting dates for this period . . . . .	<b>2</b>	04/15/21	06/15/21		
		Days:	Days:		
<b>3</b> Number of days from the date on line 2 to the date the amount on line 1a was paid or 6/30/21, whichever is earlier . . . . .	<b>3</b>	15	15		
	<b>3</b>	61	15		
<b>4</b> Underpayment on line 1a x $\frac{\text{Number of days on line 3}}{365}$ x 0.03	<b>4</b>	5			
	<b>4</b>	\$ 26	\$ 8		
<b>Rate Period 2: July 1, 2021 - September 30, 2021</b>					
<b>5</b> Computation starting dates for this period . . . . .	<b>5</b>	06/30/21	06/30/21	09/15/21	
		Days:	Days:	Days:	
<b>6</b> Number of days from the date on line 5 to the date the amount on line 1a was paid or 9/30/21, whichever is earlier . . . . .	<b>6</b>	15			
	<b>6</b>	77	92	15	
<b>7</b> Underpayment on line 1a x $\frac{\text{Number of days on line 6}}{365}$ x 0.03	<b>7</b>	3			
	<b>7</b>	\$ 23	\$ 51	\$ 8	
<b>Rate Period 3: October 1, 2021 - December 31, 2021</b>					
<b>8</b> Computation starting dates for this period . . . . .	<b>8</b>	09/30/21	09/30/21	09/30/21	
		Days:	Days:	Days:	
<b>9</b> Number of days from the date on line 8 to the date the amount on line 1a was paid or 12/31/21, whichever is earlier . . . . .	<b>9</b>	92	92	92	
	<b>9</b>	92	92	92	
<b>10</b> Underpayment on line 1a x $\frac{\text{Number of days on line 9}}{365}$ x 0.03	<b>10</b>	17	51	51	
	<b>10</b>	\$ 17	\$ 51	\$ 51	
<b>Rate Period 4: January 1, 2022 - April 15, 2022</b>					
<b>11</b> Computation starting dates for this period . . . . .	<b>11</b>	12/31/21	12/31/21	12/31/21	01/15/22
		Days:	Days:	Days:	Days:
<b>12</b> Number of days from the date on line 11 to the date the amount on line 1a was paid or 4/15/22, whichever is earlier . . . . .	<b>12</b>	91			
	<b>12</b>	14	105	105	91
<b>13</b> Underpayment on line 1a x $\frac{\text{Number of days on line 12}}{365}$ x 0.03	<b>13</b>	5			
	<b>13</b>	\$ 3	\$ 58	\$ 58	\$ 50
<b>14 Penalty.</b> Add all amounts on lines 7, 10, and 13 in all columns. Enter the total here and on line 19 of Part III, Section B . . . . .					<b>14</b> \$ 417