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 \square CHECK HERE IF 1099-INT LONG LIST IS ATTACHED

1099-B PROCEEDS FROM 2023➤ SHEET #5

➤ Name/s:

	Payer (s			NARY DIV.	QUALIFIED D BOX#1B		GAIN DIST	SEC. 1250 BOX#2B	NON-DIV D		RAL TAX W/H BOX#4	FOREIGN TAX BOX#7			P-INT-DIV X#12	PRIVATE ACT
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; 1	1099-SSA soci								1			ENT	TER 1	099-Bs	> SI	HEET #
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-	MISCELLANEOUS State/NYC-UBT Refun Alimony Received			TAXPA	YER	SPOU		ADJUS	tor Expe	enses (ma	aximum \$3	00 each) *		TAXPAYE		SPOUSE
	Date of divorce or sepa	ration agreeme	nt				-					Please us		rming Arti	sts Wor	ksheet
	Bus. Freelance Incom			CO	MPLETE S	SHEET #	3				-	A] USE HSA	-			
	Other gainsor (loss) if	•					_		•			F ARMED FOR	CES)			
5	Rental Income + Expe	enses		CO	MPLETE S	SHEET #4	4 1	6 Keo	glSEPC	ontributio	ns for 202					
E	Estate/Trust/Partnership+	S Corp Income			ATTACH	K-1	1	7 Health	Insura	nce (for s	elf-emplo	yed only) [*]	****			
7	Unemployment Comp	. ATTACH 1099-0	ì				1	8 Bank F	enalty o	on Withd	raw. 1099	-INT Box #2				
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SEE NEXT PAGE FOR ESTIMATED / EXTENSION TAXES PAID

YES NO

Estimated Tax Payments

➤ Name/s:

26 Fe	deral		75 State of
QTR	DATES PAID	AMOUNT	QTR DATES
last yea ment ap year's e	r's overpay- oplied to this st. tax		last year's overp ment applied to year's est. tax
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4th			4th
	Total		
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	70 This Year's: with Extension:		*** If you hav this year
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22 N	Vr IIDT	NOT INCLUDE NYC
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Final Note: If you receive any notices / correspondence from the IRS or any other taxing jurisdiction, email, mail or fax a copy of the notice to us. Many adjustments are erroneous and can be resolved with a single correspondence.

Please Initial

Educator Expenses are applicable to K1-through HS educators.

^{**} AGI has to be \$16,000 OR Less to deduct expenses as a performing artist

^{*} If you have employees (other than your spouse) who are members of your Keogh plan or if all plan assets plus
this year's contribution are valued at \$250,000 or more, you are required to file Form 5500 by July 31st. To file the required form, we will need information
about your Keogh/Pension. Call us after April 16th to discuss this. High penalties result for non-filing. There are no filing requirements for SEP / IRA
owners

^{****} If you are not self employed, enter your health insurance payments on Sheet #2, Line 1.

^{*****} If the divorce agreement is executed in 2019 or later, there will be no deduction. If you are divorced before 2019 but changes are made, additional restrictions may apply.