

### **Federal Return**

Thank you for using FreeTaxUSA.com to prepare your 2023 income tax return.

You can view the status of your tax return by signing in to your account at www.freetaxusa.com.

2024 tax preparation on FreeTaxUSA.com will be available starting in January of 2025.

We look forward to preparing your 2024 tax return.

E1040 Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return

For the year Jar	n. 1–Dec	c. 31, 2023, or other tax year beginning			, 2	023, endi	ng	CIVID IVO. 10 10	, 20		See sep	arate instr	uctions.
					Your social security number								
EDWARD			WEINSTOCK							788   38   1199			
If joint return, spouse's first name and middle initial			Last n										urity number
Home address	(numb	er and street). If you have a P.O. box, see	instruc	tions.					Apt. no.		Presiden	tial Electio	n Campaign
_2211 M	ISS:	ION ST							В	}	Check here if you, or your		
City, town, or p	ost off	ce. If you have a foreign address, also co	mplete	nplete spaces below. State ZIF				ZIP code			0,	ly, want \$3 Checking a	
SAN FR	ANC:	ISCO	CA				9411	.0		w will not			
Foreign countr	y name			Foreign province/state/county			Foreign posta	Foreign postal code your		or refund.			
	-	a										You	Spouse
Filing Status	S	Single							ousehold (H	OH)			
Check only	Ļ	Married filing jointly (even if only one had income)											
one box.		Married filing separately (MFS)							surviving sp				
		you checked the MFS box, enter the			spous	e. If you	che	ecked the HOF	or QSS bo	x, ente	r the child	d's name i	f the
	qu	lalifying person is a child but not you	и аере	endent:									
Digital		ny time during 2023, did you: (a) rec										_	_
Assets	excl	nange, or otherwise dispose of a dig	ital ass	et (or a f	inanc	ial intere	st ir	n a digital asse	et)? (See inst	ruction	ıs.)	Yes	X No
Standard		neone can claim:   You as a de				•		a dependent					
Deduction		Spouse itemizes on a separate retur	n or yo	ou were a	dual	-status a	alien						
Age/Blindnes	s You	: Were born before January 2, 1	959	Are b	lind	Spo	use	: Was bor	n before Jar	nuary 2	, 1959	☐ Is blir	nd
Dependent	s (see	instructions):		(2)	Social	security		(3) Relationsh	(4) Chec	k the bo	x if qualifi	es for (see i	nstructions):
If more	,	irst name Last name		(-)	num			to you		d tax cr	edit	Credit for oth	er dependents
than four													
dependents, see instruction													
and check	s - ——												
here													
Income	1a	Total amount from Form(s) W-2, b	ox 1 (s	ee instru	ctions	s)					1a	124	<u>4,837.</u>
Attach Form(s)	b	Household employee wages not re				<i>I</i> -2					1b		
W-2 here. Also	С	Tip income not reported on line 1a	•		,						1c		
attach Forms W-2G and	d	Medicaid waiver payments not rep					stru	ctions)			1d		
1099-R if tax	е	Taxable dependent care benefits f									1e		
was withheld.	f	Employer-provided adoption bene					٠				1f	-	
If you did not get a Form	g	Wages from Form 8919, line 6 .									1g		
W-2, see	h	Other earned income (see instruct	,						· · · ·		1h	-	
instructions.	'	Nontaxable combat pay election (s	see ins	tructions	) .			<u>1</u> i			- 4-	1 2	4,837.
A# O D	z 2a	Add lines 1a through 1h  Tax-exempt interest	2a				· h T	axable interes			1z 2b	12.	±,03/.
Attach Sch. B if required.	3a	· –	3a		78			rdinary divide			3b	<u> </u>	1,117.
	4a		4a		70			axable amoun			4b	-	<u> </u>
Standard	5a		5a					axable amoun			5b		
Deduction for— Single or	6a		6a					axable amoun			6b		
Married filing separately,	С	If you elect to use the lump-sum e	_	method.	. chec					r			
\$13,850	7	·	ain or (loss). Attach Schedule D if required. If not required, check here						7		0.		
Married filing jointly or	8	Additional income from Schedule		•							8		
Qualifying surviving spouse,	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7									9	12!	5,954.
\$27,700	10	Adjustments to income from Sche									10		0.
Head of household,	11	Subtract line 10 from line 9. This is			gros	s incom	ne				11	12!	5,954.
\$20,800 If you checked	12	Standard deduction or itemized									12		3,850.
any box under	13	Qualified business income deduct	ion fro	m Form 8	3995 d	or Form	899	5-A			13		3.
Standard Deduction,	14	Add lines 12 and 13									14		3,853.
see instructions.	15	Subtract line 14 from line 11. If zer	o or le	ss, enter	-0 7	This is yo	our <b>t</b>	axable incom	ne		15	112	2,101.

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

Cat. No. 11320B

Form **1040** (2023)

Form 1040 (2023	B) EDI	WARD WEINSTOCK						788-	<u>38</u>	-1199 Page <b>2</b>	
Tax and	16	Tax (see instructions). Check	if any from Form	(s): <b>1</b> 881	4 <b>2</b> 🗌 4972	3 🗌		. 4	16	20,233.	
Credits	17	Amount from Schedule 2, lin	ie 3					. 1	17	0.	
	18	Add lines 16 and 17						. 1	18	20,233.	
	19	Child tax credit or credit for	other dependen	ts from Sched	ule 8812			. 1	19		
	20	Amount from Schedule 3, lin	ie 8					. 2	20	38.	
	21	Add lines 19 and 20						. 2	21	38.	
	22	Subtract line 21 from line 18	. If zero or less,	enter -0				. 2	22	20,195.	
	23	Other taxes, including self-e	mployment tax,	from Schedule	e 2, line 21			. 2	23		
	24	Add lines 22 and 23. This is	your <b>total tax</b>					. 2	24	20,195.	
Payments	25	Federal income tax withheld									
•	а	Form(s) W-2				25a	20,0	37.		1	
	b	Form(s) 1099				25b				1	
	С	Other forms (see instructions	s)			25c				1	
	d	Add lines 25a through 25c						. 2	5d	20,037.	
If you have a	26	2023 estimated tax payment	ts and amount a	pplied from 20	22 return			. 2	26	•	
qualifying child,	27	Earned income credit (EIC)				27					
attach Sch. EIC.	28	Additional child tax credit from	n Schedule 8812			28				1	
	29	American opportunity credit	from Form 8863	3, line 8		29				1	
	30	Reserved for future use .				30				1	
	31	Amount from Schedule 3, lin	ie 15			31				1	
	32	Add lines 27, 28, 29, and 31	. These are your	total other pa	ayments and refu	ındable cred	its .	. 3	32	1	
	33	Add lines 25d, 26, and 32. T	hese are your <b>to</b>	tal payments				. 3	33	20,037.	
Refund	34	If line 33 is more than line 24							34		
	35a								5a		
Direct deposit?	b							rings			
See instructions.	d									1	
	36	Amount of line 34 you want	applied to your	2024 estimate	ed tax	36				1	
Amount	37	Subtract line 33 from line 24	. This is the <b>amo</b>	ount you owe						ı	
You Owe		For details on how to pay, go to www.irs.gov/Payments or see instructions				. 3	37	158.			
	38	Estimated tax penalty (see in	nstructions) .			38					
<b>Third Party</b>		you want to allow another	•								
Designee	ins	instructions							X No		
		Designee's Phone Personal identifiname no. number (PIN)							ion		
Cian		der penalties of perjury, I declare the	nat I have examined		accompanying sche			` '	nest (	of my knowledge and	
Sign		lief, they are true, correct, and com									
Here	Your signature			Date Your occupation				If the IRS	3 ser	nt you an Identity	
					·					IN, enter it here	
Joint return?					DATA SCIENTIST			(see inst			
See instructions. Keep a copy for	Sp	ouse's signature. If a joint return, I	Date	Spouse's occupat	ion			the IRS sent your spouse an dentity Protection PIN, enter it her			
your records.							(see inst				
	Phone no. 929-594-8599 Email address										
D-1-I		eparer's name	Preparer's signat					ΓIN	$\Box$	Check if:	
Paid			   SELF-PREP	ARED						Self-employed	
Preparer							Phone n	ne no.			
Use Only								Firm's E			
									_		

# SCHEDULE 3 (Form 1040)

Department of the Treasury Internal Revenue Service

## **Additional Credits and Payments**

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

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

OMB No. 1545-0074

2023

Attachment
Sequence No. 03

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

Your social security number 788-38-1199

Par	Nonrelundable Credits		
1	Foreign tax credit. Attach Form 1116 if required	1	38.
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:		
а	General business credit. Attach Form 3800 6a		
b	Credit for prior year minimum tax. Attach Form 8801 6b		
С	Adoption credit. Attach Form 8839 6c		
d	Credit for the elderly or disabled. Attach Schedule R 6d		
е	Reserved for future use		
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		
-1	Amount on Form 8978, line 14. See instructions 61		
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	38.

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

Cat. No. 71480G

(continued on page 2)
Schedule 3 (Form 1040) 2023

Schedule 3 (Form 1040) 2023 Page **2** 

Par	t 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:			
а	Form 2439	13a		
b	Credit for repayment of amounts included in income from earlier years	13b		
С	Elective payment election amount from Form 3800, Part III, line 6, column (i)	13c		
d	Deferred amount of net 965 tax liability (see instructions)	13d		
Z	Other payments or refundable credits. List type and amount:	13z		
14	Total other payments or refundable credits. Add lines 13a through	13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040 line 31		15	

Schedule 3 (Form 1040) 2023

## Form **8995**

Department of the Treasury

Internal Revenue Service

Qualified Business Income Deduction Simplified Computation

Attach to your tax return.

Go to www.irs.gov/Form8995 for instructions and the latest information.

OMB No. 1545-2294

2023

Attachment Sequence No. **55** 

Name(s) shown on return	Your taxpayer identification number
EDWARD WEINSTOCK	788-38-1199

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

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

1	(a) Trade, business, or aggregation name	io	(b) Taxpayer dentification number	(c)	(c) Qualified business income or (loss)	
i						
ii						
2	Total qualified business income or (loss). Combine lines 1i through 1v,					
	column (c)	2				
3	Qualified business net (loss) carryforward from the prior year	3	(	)		
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-	4				
5	Qualified business income component. Multiply line 4 by 20% (0.20)			5		
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions)	6	15	•		
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7	(	)		
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero	8	15	7		
9	or less, enter -0			9	3.	
10	Qualified business income deduction before the income limitation. Add lines 5 an			10	3.	
11	Taxable income before qualified business income deduction (see instructions)	11	I.		<u> </u>	
12	Enter your net capital gain, if any, increased by any qualified dividends					
	(see instructions)	12	789			
13	Subtract line 12 from line 11. If zero or less, enter -0	13	111,315			
14	Income limitation. Multiply line 13 by 20% (0.20)			14	22,263.	
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also			1		
	the applicable line of your return (see instructions)			15	3.	
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater that			16	( )	
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 a			I		
	zero, enter -0			17	Ι( )	

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

Cat. No. 37806C

Form **8995** (2023)