

STAHELI & JACOBSEN CPA'S
PO BOX 911030
SAINT GEORGE, UT 84791
(435) 656-8138

Please find enclosed copies of your tax return(s) for the tax year ended December 31, 2021. Instructions for filing your return(s) are attached for your convenience. Retain the copies for your records.

The federal income tax return will be electronically filed, do not mail the enclosed copy, but retain it for your records.

Form 1040 Federal Individual Income Tax Return

The Utah income tax return will be electronically filed, do not mail the enclosed copy, but retain it for your records.

Form TC-40 Utah Individual Income Tax

We prepared your returns based on the information you provided us. Please review the returns carefully to ensure that there are no omissions or misstatements of material facts.

If you have any questions about your tax returns, please contact us. We appreciate this opportunity to serve you.

Sincerely,

STAHELI & JACOBSEN CPA'S

Tax Summary and Instructions for Filing
2021 Federal Individual Income Tax Return

Summary of Federal Information:

Federal adjusted gross income	\$ 6,275,703.00
Federal taxable income	\$ 6,255,971.00
Federal refund	\$ 23,112.00

Your return will be electronically filed.

Your federal refund of \$23,112.00 will be directly deposited in your bank account.

Tax Summary and Instructions for Filing
2021 Utah Individual Income Tax Return

Summary of Form TC-40 Information:

State taxable income	\$ 6,275,703.00
State refund	\$ 1,633.00

Your Utah return will be electronically filed.

Your Utah refund of \$1,633.00 will be directly deposited in your bank account.

2021 Individual Income Tax Return
prepared for:

DANIEL L. JOHNSON
134 SOUTH 1160 WEST CIRCLE
SAINT GEORGE, UT 84770

STAHeli & JACOBSEN CPA'S
PO BOX 911030
SAINT GEORGE, UT 84791

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 DANIEL L		Last name JOHNSON		Your social security number 529-95-0491	
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. 134 SOUTH 1160 WEST CIRCLE				Apt. no.	
City, town, or post office. If you have a foreign address, also complete spaces below. SAINT GEORGE			State UT	ZIP code 84770	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. <input type="checkbox"/> You <input type="checkbox"/> Spouse
Foreign country name		Foreign province/state/county		Foreign postal code	

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

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions):	
(1) First name	Last name			Child tax credit	Credit for other dependents
PEPYR L	JOHNSON	647-21-1693	Daughter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
QUINN D	JOHNSON	868-70-5632	Daughter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Attach Sch. B if required.	1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	46,007.
	2a	Tax-exempt interest	2b	3,967.
	3a	Qualified dividends	3b	51,555.
	4a	IRA distributions	4b	
Standard Deduction for— • Single or Married filing separately, \$12,550 • Married filing jointly or Qualifying widow(er), \$25,100 • Head of household, \$18,800 • If you checked any box under Standard Deduction , see instructions.	5a	Pensions and annuities	5b	
	6a	Social security benefits	6b	
	7	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	7	6,206,181.
	8	Other income from Schedule 1, line 10	8	-24,807.
	9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income ▶	9	6,282,903.
	10	Adjustments to income from Schedule 1, line 26	10	7,200.
	11	Subtract line 10 from line 9. This is your adjusted gross income ▶	11	6,275,703.
	12a	Standard deduction or itemized deductions (from Schedule A)	12a	19,471.
	b	Charitable contributions if you take the standard deduction (see instructions)	12b	
	c	Add lines 12a and 12b	12c	19,471.
	13	Qualified business income deduction from Form 8995 or Form 8995-A	13	261.
	14	Add lines 12c and 13	14	19,732.
	15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	15	6,255,971.

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	16	1,224,433.
17	Amount from Schedule 2, line 3	17	7,819.
18	Add lines 16 and 17	18	1,232,252.
19	Nonrefundable child tax credit or credit for other dependents from Schedule 8812	19	
20	Amount from Schedule 3, line 8	20	840.
21	Add lines 19 and 20	21	840.
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	1,231,412.
23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	232,877.
24	Add lines 22 and 23. This is your total tax	24	1,464,289.
25	Federal income tax withheld from:		
a	Form(s) W-2	25a	5,004.
b	Form(s) 1099	25b	
c	Other forms (see instructions)	25c	
d	Add lines 25a through 25c	25d	5,004.
26	2021 estimated tax payments and amount applied from 2020 return	26	33,000.
27a	Earned income credit (EIC) 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"/>	27a	
b	Nontaxable combat pay election	27b	
c	Prior year (2019) earned income	27c	
28	Refundable child tax credit or additional child tax credit from Schedule 8812	28	
29	American opportunity credit from Form 8863, line 8	29	
30	Recovery rebate credit. See instructions	30	
31	Amount from Schedule 3, line 15	31	1,450,000.
32	Add lines 27a and 28 through 31. These are your total other payments and refundable credits	32	1,450,000.
33	Add lines 25d, 26, and 32. These are your total payments	33	1,488,004.
Refund	34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	23,715.
35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	35a	23,112.
Direct deposit? See instructions.	b Routing number 3 2 4 3 7 7 5 1 6 c Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings		
	d Account number 7 4 6 0 0 8 0 0 9 5 7 3		
36	Amount of line 34 you want applied to your 2022 estimated tax	36	
Amount You Owe	37 Amount you owe . Subtract line 33 from line 24. For details on how to pay, see instructions	37	
	38 Estimated tax penalty (see instructions)	38	603.

Third Party DesigneeDo you want to allow another person to discuss this return with the IRS? See instructions ☒ **Yes**. Complete below. ☐ **No**Designee's name **NATE STAHELI**Phone no. **(435) 656-8138**Personal identification number (PIN) **1 1 1 1 1****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

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Spouse's signature. If a joint return, **both** must sign.

Date

Spouse's occupation

If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)

Phone no.

Email address

Paid Preparer Use Only

Preparer's name

Preparer's signature

Date

PTIN

Check if:

NATE STAHELI**P00296497**☐ Self-employedFirm's name **STAHELI & JACOBSEN CPA'S**Phone no. **(435) 656-8138**Firm's address **PO BOX 911030 SAINT GEORGE UT 84791**Firm's EIN **27-0372684**

SCHEDULE 1
(Form 1040)Department of the Treasury
Internal Revenue Service**Additional Income and Adjustments to Income**

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

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

OMB No. 1545-0074

2021
Attachment
Sequence No. **01**

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

DANIEL L JOHNSON

Your social security number

529-95-0491

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions) ▶ _____		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	-24,807.
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling income	8b	
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Taxable Health Savings Account distribution	8e	
f	Alaska Permanent Fund dividends	8f	
g	Jury duty pay	8g	
h	Prizes and awards	8h	
i	Activity not engaged in for profit income	8i	
j	Stock options	8j	
k	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	8k	
l	Olympic and Paralympic medals and USOC prize money (see instructions)	8l	
m	Section 951(a) inclusion (see instructions)	8m	
n	Section 951A(a) inclusion (see instructions)	8n	
o	Section 461(l) excess business loss adjustment	8o	
p	Taxable distributions from an ABLE account (see instructions)	8p	
z	Other income. List type and amount ▶ _____	8z	
9	Total other income. Add lines 8a through 8z	9	
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	-24,807.

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

Schedule 1 (Form 1040) 2021

Part II Adjustments to Income

11	Educator expenses	11	
12	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	12	
13	Health savings account deduction. Attach Form 8889	13	7,200.
14	Moving expenses for members of the Armed Forces. Attach Form 3903	14	
15	Deductible part of self-employment tax. Attach Schedule SE	15	
16	Self-employed SEP, SIMPLE, and qualified plans	16	
17	Self-employed health insurance deduction	17	
18	Penalty on early withdrawal of savings	18	
19a	Alimony paid	19a	
b	Recipient's SSN ▶		
c	Date of original divorce or separation agreement (see instructions) ▶		
20	IRA deduction	20	
21	Student loan interest deduction	21	
22	Reserved for future use	22	
23	Archer MSA deduction	23	
24	Other adjustments:		
a	Jury duty pay (see instructions)	24a	
b	Deductible expenses related to income reported on line 8k from the rental of personal property engaged in for profit	24b	
c	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8l	24c	
d	Reforestation amortization and expenses	24d	
e	Repayment of supplemental unemployment benefits under the Trade Act of 1974	24e	
f	Contributions to section 501(c)(18)(D) pension plans	24f	
g	Contributions by certain chaplains to section 403(b) plans	24g	
h	Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions)	24h	
i	Attorney fees and court costs you paid in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations	24i	
j	Housing deduction from Form 2555	24j	
k	Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041)	24k	
z	Other adjustments. List type and amount ▶	24z	
25	Total other adjustments. Add lines 24a through 24z	25	
26	Add lines 11 through 23 and 25. These are your adjustments to income . Enter here and on Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a	26	7,200.

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

2021
Attachment
Sequence No. **02**

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

DANIEL L JOHNSON

Your social security number

529-95-0491

Part I Tax

1	Alternative minimum tax. Attach Form 6251	1	7,819.
2	Excess advance premium tax credit repayment. Attach Form 8962	2	
3	Add lines 1 and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17 . .	3	7,819.

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	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	230,877.
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) 2021

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 in 2021, 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	Additional tax from Schedule 8812	19	2,000.
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	232,877.

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

2021
Attachment
Sequence No. **03**

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

DANIEL L JOHNSON

Your social security number

529-95-0491

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	840.
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	
5	Residential energy credits. Attach Form 5695	5	
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	Alternative motor vehicle credit. Attach Form 8910	6e	
f	Qualified plug-in motor 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	
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 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20	8	840.

(continued on page 2)

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	1,450,000.
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	Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken before April 1, 2021	13b	
c	Health coverage tax credit from Form 8885	13c	
d	Credit for repayment of amounts included in income from earlier years	13d	
e	Reserved for future use	13e	
f	Deferred amount of net 965 tax liability (see instructions)	13f	
g	Credit for child and dependent care expenses from Form 2441, line 10. Attach Form 2441	13g	
h	Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken after March 31, 2021	13h	
z	Other payments or refundable credits. List type and amount ►	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31	15	1,450,000.

**SCHEDULE A
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)**Itemized Deductions**► Go to www.irs.gov/ScheduleA for instructions and the latest information.

► Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

2021Attachment
Sequence No. **07****Caution:** If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

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

DANIEL L JOHNSON

Your social security number

529-95-0491

**Medical
and
Dental
Expenses****Caution:** Do not include expenses reimbursed or paid by others.

- 1 Medical and dental expenses (see instructions) **1**
- 2 Enter amount from Form 1040 or 1040-SR, line 11 **2**
- 3 Multiply line 2 by 7.5% (0.075) **3**
- 4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- **4**

**Taxes You
Paid**

- 5 State and local taxes.
- a State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box ► ☐
- b State and local real estate taxes (see instructions) **5b**
- c State and local personal property taxes **5c**
- d Add lines 5a through 5c **5d**
- e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately) **5e**
- 6 Other taxes. List type and amount ►

5a 2,280.

5b 2,797.

5c

5d 5,077.

5e 5,077.

7 Add lines 5e and 6

5,077.

**Interest
You Paid****Caution:** Your mortgage interest deduction may be limited (see instructions).

- 8 Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box ► ☐
- a Home mortgage interest and points reported to you on Form 1098. See instructions if limited **8a**
- b Home mortgage interest not reported to you on Form 1098. See instructions if limited. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address **8b**
- c Points not reported to you on Form 1098. See instructions for special rules **8c**
- d Mortgage insurance premiums (see instructions) **8d**
- e Add lines 8a through 8d **8e**
- 9 Investment interest. Attach Form 4952 if required. See instructions **9**
- 10 Add lines 8e and 9 **10**

8a 14,234.

8b

8c

8d 0.

8e 14,234.

9

14,234.

**Gifts to
Charity****Caution:** If you made a gift and got a benefit for it, see instructions.

- 11 Gifts by cash or check. If you made any gift of \$250 or more, see instructions **11**
- 12 Other than by cash or check. If you made any gift of \$250 or more, see instructions. You **must** attach Form 8283 if over \$500. **12**
- 13 Carryover from prior year **13**
- 14 Add lines 11 through 13 **14**

11 160.

12

13

160.

**Casualty and
Theft Losses**

- 15 Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions **15**

**Other
Itemized
Deductions**

- 16 Other—from list in instructions. List type and amount ►

16**Total
Itemized
Deductions**

- 17 Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040 or 1040-SR, line 12a **17**
- 18 If you elect to itemize deductions even though they are less than your standard deduction, check this box ► ☐

19,471.

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 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

2021Attachment
Sequence No. **12**

Name(s) shown on return

DANIEL L JOHNSON

Your social security number

529-95-0491

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 .	194,547.	194,121.		426.
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	92,399.	91,529.	233.	1,103.
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 3,593.
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back				7 5,122.

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 .				
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	7,125,000.	0.		7,125,000.
10 Totals for all transactions reported on Form(s) 8949 with Box F checked			-1,000,000.	-1,000,000.
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				13 76,059.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on the back				15 6,201,059.

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

BAA REV 09/09/22 PRO

Schedule D (Form 1040) 2021

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	6,206,181.
<ul style="list-style-type: none"> • 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? <input checked="" type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> 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 ►	19	
20	Are lines 18 and 19 both zero or blank and are you not filing Form 4952? <input checked="" type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 16. Don't complete lines 21 and 22 below. <input type="checkbox"/> 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: <ul style="list-style-type: none"> • The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500) 	21	()
Note: When figuring which amount is smaller, treat both amounts as positive numbers.			
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 16. <input type="checkbox"/> No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Sales and Other Dispositions of Capital Assets

► Go to 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.

Name(s) shown on return

DANIEL L JOHNSON

Social security number or taxpayer identification number

529-95-0491

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 Note 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). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FIDELITY	08/11/21	12/31/21	92,399.	91,529.	W	233.	1,103.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				92,399.	91,529.		233.	1,103.

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.

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

DANIEL L JOHNSON

529-95-0491

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 Note 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). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	ZONOS	Various	07/31/21	7,125,000.	0.			7,125,000.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ►				7,125,000.	0.			7,125,000.

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.

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

DANIEL L JOHNSON

529-95-0491

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 Note 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). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	83-3873722	12/10/21				Z	-350,000.	-350,000.
	85-4323971	12/31/21				Z	-300,000.	-300,000.
	85-3274399	12/31/21				Z	-350,000.	-350,000.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶							-1,000,000.	-1,000,000.

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.

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

DANIEL L JOHNSON

Your social security number

529-95-0491

Caution: The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

Part II **Income or Loss From Partnerships and S Corporations** – **Note:** If you report a loss, receive a distribution, dispose of stock, or receive a loan repayment from an S corporation, you **must** check the box in column (e) on line 28 and attach the required basis computation. If you report a loss from an at-risk activity for which **any** amount is **not** at risk, you **must** check the box in column (f) on line 28 and attach **Form 6198**. See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section ☐ **Yes** ☒ **No**

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if basis computation is required	(f) Check if any amount is not at risk
A	CNL STRATEGIC CAPITAL LLC	P	<input type="checkbox"/>	32-0503849	<input type="checkbox"/>	<input type="checkbox"/>
B	BRIDGE OPPORTUNITY ZONE FUND IV LP	P	<input type="checkbox"/>	85-4323971	<input type="checkbox"/>	<input type="checkbox"/>
C	CYNOSURE PARTNERS 2020 PV LP	P	<input type="checkbox"/>	85-4331489	<input type="checkbox"/>	<input type="checkbox"/>
D	See line 28 information		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Passive Income and Loss			Nonpassive Income and Loss		
(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss allowed (see Schedule K-1)	(j) Section 179 expense deduction from Form 4562	(k) Nonpassive income from Schedule K-1	
A					0.
B	185.				
C		191.			
D	6.		24,807.		
29a Totals		191.			0.
b Totals	191.		24,807.		
30	Add columns (h) and (k) of line 29a.				30 191.
31	Add columns (g), (i), and (j) of line 29b.				31 (24,998.)
32	Total partnership and S corporation income or (loss). Combine lines 30 and 31				32 -24,807.

Part III **Income or Loss From Estates and Trusts**

33		(a) Name	(b) Employer identification number	
A				
B				
Passive Income and Loss			Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)		(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A				
B				
34a	Totals			
b	Totals			
35	Add columns (d) and (f) of line 34a			35 <input type="text"/>
36	Add columns (c) and (e) of line 34b			36 (<input type="text"/>)
37	Total estate and trust income or (loss). Combine lines 35 and 36			37 <input type="text"/>

Part IV **Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) – Residual Holder**

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q , line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q , line 1b	(e) Income from Schedules Q , line 3b
39	Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below				39

Part V **Summary**

40	Net farm rental income or (loss) from Form 4835 . Also, complete line 42 below				40
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Schedule 1 (Form 1040), line 5 ▶				41 -24,807.
42	Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120-S), box 17, code AD; and Schedule K-1 (Form 1041), box 14, code F. See instructions				42
43	Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040, Form 1040-SR, or Form 1040-NR from all rental real estate activities in which you materially participated under the passive activity loss rules				43

Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T. COPY 1

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

Name **DANIEL L JOHNSON** Identifying number as shown on page 1 of your tax return **529-95-0491**

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- ☐ Section 951A category income ☒ Passive category income ☐ Section 901(j) income ☐ Lump-sum distributions
☐ Foreign branch category income ☐ General category income ☐ Certain income re-sourced by treaty

h Resident of (name of country) ▶ **USA**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to **more than one** foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for category checked above)

		Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
		A	B	C	
i	Enter the name of the foreign country or U.S. possession ▶	Various			
1a	Gross income from sources within country shown above and of the type checked above (see instructions): From 1099s				
		6,200.			1a 6,200.
b	Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions . . . ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions.):					
2	Expenses definitely related to the income on line 1a (attach statement)				
3	Pro rata share of other deductions not definitely related: SEE STMT				
a	Certain itemized deductions or standard deduction (see instructions)	5,077.			
b	Other deductions (attach statement)	7,200.			
c	Add lines 3a and 3b	12,277.			
d	Gross foreign source income (see instructions)	6,200.			
e	Gross income from all sources (see instructions)	7,307,901.			
f	Divide line 3d by line 3e (see instructions)	0.0008			
g	Multiply line 3c by line 3f	10.			
4	Pro rata share of interest expense (see instructions):				
a	Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)	11.			
b	Other interest expense				
5	Losses from foreign sources				
6	Add lines 2, 3g, 4a, 4b, and 5	21.			6 21.
7	Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				7 6,179.

Part II Foreign Taxes Paid or Accrued (see instructions)

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add cols. (q) through (t))
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties		(o) Interest	(q) Dividends	(r) Rents and royalties		
A	12/31/2021					840.				840.
B										
C										
8	Add lines A through C, column (u). Enter the total here and on line 9, page 2 ▶									8 840.

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	840 .	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	840 .	
12	Reduction in foreign taxes (see instructions)	12	()	
13	Taxes reclassified under high tax kickout (see instructions)	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		840 .
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions	15	6,179 .	
16	Adjustments to line 15 (see instructions)	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	6,179 .	
18	Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption	18	6,255,971 .	
	Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		0.0010
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16	20		1,224,433 .
	Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.			
21	Multiply line 20 by line 19 (maximum amount of credit)	21		1,224 .
22	Increase in limitation (section 960(c))	22		
23	Add lines 21 and 22	23		1,224 .
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV. See instructions	24		840 .

Part IV Summary of Credits From Separate Parts III (see instructions)

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31	32		
33	Enter the smaller of line 20 or line 32	33		840 .
34	Reduction of credit for international boycott operations. See instructions for line 12	34		
35	Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a	35		840 .

Foreign Tax CreditDepartment of the Treasury
Internal Revenue Service (99)

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T. COPY 1

▶ Go to www.irs.gov/Form1116 for instructions and the latest information.**2021**
Attachment
Sequence No. **19**

Name **DANIEL L JOHNSON** Identifying number as shown on page 1 of your tax return **529-95-0491**

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- ☐ Section 951A category income ☒ Passive category income ☐ Section 901(j) income ☐ Lump-sum distributions
☐ Foreign branch category income ☐ General category income ☐ Certain income re-sourced by treaty

h Resident of (name of country) ▶ **USA**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to **more than one** foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for category checked above)

		Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
		A	B	C	
i	Enter the name of the foreign country or U.S. possession ▶	Various			
1a	Gross income from sources within country shown above and of the type checked above (see instructions): From 1099s				
		6,200.			1a 6,200.
b	Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions . . . ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions.):					
2	Expenses definitely related to the income on line 1a (attach statement)				
3	Pro rata share of other deductions not definitely related: SEE STMT				
a	Certain itemized deductions or standard deduction (see instructions)				
b	Other deductions (attach statement)	7,200.			
c	Add lines 3a and 3b	7,200.			
d	Gross foreign source income (see instructions)	6,200.			
e	Gross income from all sources (see instructions)	7,307,901.			
f	Divide line 3d by line 3e (see instructions)	0.0008			
g	Multiply line 3c by line 3f	6.			
4	Pro rata share of interest expense (see instructions):				
a	Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b	Other interest expense				
5	Losses from foreign sources				
6	Add lines 2, 3g, 4a, 4b, and 5	6.			6
7	Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				7 6,194.

Part II Foreign Taxes Paid or Accrued (see instructions)

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued	(u) Total foreign taxes paid or accrued (add cols. (q) through (t))
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties		(o) Interest	(q) Dividends	(r) Rents and royalties		
A	12/31/2021					840.				840.
B										
C										
8	Add lines A through C, column (u). Enter the total here and on line 9, page 2 ▶									8 840.

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	840 .	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	840 .	
12	Reduction in foreign taxes (see instructions)	12	()	
13	Taxes reclassified under high tax kickout (see instructions)	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		840 .
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. See instructions	15	6,194 .	
16	Adjustments to line 15 (see instructions)	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	6,194 .	
18	Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption	18	6,261,048 .	
	Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		0.0010
20	Individuals: Enter the total of Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16	20		1,232,252 .
	Caution: If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.			
21	Multiply line 20 by line 19 (maximum amount of credit)	21		1,232 .
22	Increase in limitation (section 960(c))	22		
23	Add lines 21 and 22	23		1,232 .
24	Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV. See instructions	24		840 .

Part IV Summary of Credits From Separate Parts III (see instructions)

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31	32		
33	Enter the smaller of line 20 or line 32	33		840 .
34	Reduction of credit for international boycott operations. See instructions for line 12	34		
35	Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a	35		840 .

Alternative Minimum Tax—Individuals

► Go to www.irs.gov/Form6251 for instructions and the latest information.
► Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074

2021
Attachment
Sequence No. **32**

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

DANIEL L JOHNSON

Your social security number

529-95-0491

Part I Alternative Minimum Taxable Income (See instructions for how to complete each line.)

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	6,255,971.
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 12a	2a	5,077.
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	2g	
h	Qualified small business stock, see instructions	2h	0.
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	0.
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	0.
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 \$752,800, see instructions.)	4	6,261,048.

Part II Alternative Minimum Tax (AMT)

5	Exemption. IF your filing status is . . . Single or head of household \$ 523,600 \$ 73,600 Married filing jointly or qualifying widow(er) 1,047,200 114,600 Married filing separately 523,600 57,300 AND line 4 is not over . . . THEN enter on line 5 . . . If line 4 is over the amount shown above for your filing status, see instructions.	5	0.
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	6,261,048.
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 \$199,900 or less (\$99,950 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$3,998 (\$1,999 if married filing separately) from the result.	7	1,232,252.
8	Alternative minimum tax foreign tax credit (see instructions)	8	840.
9	Tentative minimum tax. Subtract line 8 from line 7	9	1,231,412.
10	Add Form 1040 or 1040-SR, line 16 (minus any tax from Form 4972), and Schedule 2 (Form 1040), line 2. 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	1,223,593.
11	AMT. Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1	11	7,819.

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	6,261,048.
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, if necessary). See instructions. If you are filing Form 2555, see instructions for the amount to enter	13	6,211,587.
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	6,211,587.
16	Enter the smaller of line 12 or line 15	16	6,211,587.
17	Subtract line 16 from line 12	17	49,461.
18	If line 17 is \$199,900 or less (\$99,950 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract \$3,998 (\$1,999 if married filing separately) from the result . . . ▶	18	12,860.
19	Enter: • \$80,800 if married filing jointly or qualifying widow(er), • \$40,400 if single or married filing separately, or • \$54,100 if head of household. } . . .	19	54,100.
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-. If you are filing Form 2555, see instructions for the amount to enter	20	44,384.
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	9,716.
22	Enter the smaller of line 12 or line 13	22	6,211,587.
23	Enter the smaller of line 21 or line 22. This amount is taxed at 0%	23	9,716.
24	Subtract line 23 from line 22	24	6,201,871.
25	Enter: • \$445,850 if single, • \$250,800 if married filing separately, • \$501,600 if married filing jointly or qualifying widow(er), or • \$473,750 if head of household. } . . .	25	473,750.
26	Enter the amount from line 21	26	9,716.
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	44,384.
28	Add line 26 and line 27	28	54,100.
29	Subtract line 28 from line 25. If zero or less, enter -0-	29	419,650.
30	Enter the smaller of line 24 or line 29	30	419,650.
31	Multiply line 30 by 15% (0.15) ▶	31	62,948.
32	Add lines 23 and 30	32	429,366.
If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33.			
33	Subtract line 32 from line 22	33	5,782,221.
34	Multiply line 33 by 20% (0.20) ▶	34	1,156,444.
If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35.			
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	1,232,252.
39	If line 12 is \$199,900 or less (\$99,950 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract \$3,998 (\$1,999 if married filing separately) from the result	39	1,749,095.
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	1,232,252.

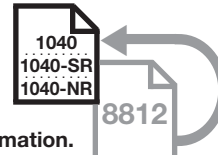
SCHEDULE 8812
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

**Credits for Qualifying Children
and Other Dependents**

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

▶ Go to www.irs.gov/Schedule8812 for instructions and the latest information.



OMB No. 1545-0074

2021

Attachment
Sequence No. **47**

Name(s) shown on return

DANIEL L JOHNSON

Your social security number

529-95-0491

Part I-A Child Tax Credit and Credit for Other Dependents

1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR	1	6,275,703.
2a	Enter income from Puerto Rico that you excluded	2a	
b	Enter the amounts from lines 45 and 50 of your Form 2555	2b	0.
c	Enter the amount from line 15 of your Form 4563	2c	
d	Add lines 2a through 2c	2d	0.
3	Add lines 1 and 2d	3	6,275,703.
4a	Number of qualifying children under age 18 with the required social security number	4a	2.
b	Number of children included on line 4a who were under age 6 at the end of 2021	4b	0.
c	Subtract line 4b from line 4a	4c	2.
5	If line 4a is more than zero, enter the amount from the Line 5 Worksheet ; otherwise, enter -0-	5	4,000.
6	Number of other dependents, including any qualifying children who are not under age 18 or who do not have the required social security number	6	0.
Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4a.			
7	Multiply line 6 by \$500	7	
8	Add lines 5 and 7	8	4,000.
9	Enter the amount shown below for your filing status. • Married filing jointly—\$400,000 } • All other filing statuses—\$200,000 }	9	200,000.
10	Subtract line 9 from line 3. • If zero or less, enter -0-. • If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc. }	10	6,076,000.
11	Multiply line 10 by 5% (0.05)	11	303,800.
12	Subtract line 11 from line 8. If zero or less, enter -0-	12	0.
13	Check all the boxes that apply to you (or your spouse if married filing jointly). A Check here if you (or your spouse if married filing jointly) had a principal place of abode in the United States for more than half of 2021 <input checked="" type="checkbox"/> B Check here if you (or your spouse if married filing jointly) were a bona fide resident of Puerto Rico for 2021 <input type="checkbox"/>		

Part I-B Filers Who Check a Box on Line 13

Caution: If you did not check a box on line 13, do not complete Part I-B; instead, skip to Part I-C.

14a	Enter the smaller of line 7 or line 12	14a	0.
b	Subtract line 14a from line 12	14b	0.
c	If line 14a is zero, enter -0-; otherwise, enter the amount from the Credit Limit Worksheet A	14c	0.
d	Enter the smaller of line 14a or line 14c	14d	0.
e	Add lines 14b and 14d	14e	0.
f	Enter the aggregate amount of advance child tax credit payments you (and your spouse if filing jointly) received for 2021. See your Letter(s) 6419 for the amounts to include on this line. If you are missing Letter 6419, see the instructions before entering an amount on this line. If you didn't receive any advance child tax credit payments for 2021, enter -0-	14f	2,000.
Caution: If the amount on this line doesn't match the aggregate amounts reported to you (and your spouse if filing jointly) on your Letter(s) 6419, the processing of your return will be delayed.			
g	Subtract line 14f from line 14e. If zero or less, enter -0- on lines 14g through 14i and go to Part III	14g	0.
h	Enter the smaller of line 14d or line 14g. This is your credit for other dependents. Enter this amount on line 19 of your Form 1040, 1040-SR, or 1040-NR	14h	0.
i	Subtract line 14h from line 14g. This is your refundable child tax credit. Enter this amount on line 28 of your Form 1040, 1040-SR, or 1040-NR	14i	0.

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

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Schedule 8812 (Form 1040) 2021

Part I-C Filers Who Do Not Check a Box on Line 13**Caution:** If you checked a box on line 13, do not complete Part I-C.

15a	Enter the amount from the Credit Limit Worksheet A	15a	
b	Enter the smaller of line 12 or line 15a	15b	
Additional child tax credit. Complete Parts II-A through II-C if you meet each of the following items.			
1. You are not filing Form 2555.			
2. Line 4a is more than zero.			
3. Line 12 is more than line 15a.			
c	If you completed Parts II-A through II-C, enter the amount from line 27; otherwise, enter -0-	15c	
d	Add lines 15b and 15c	15d	
e	Enter the aggregate amount of advance child tax credit payments you (and your spouse if filing jointly) received for 2021. See your Letter(s) 6419 for the amounts to include on this line. If you are missing Letter 6419, see the instructions before entering an amount on this line. If you didn't receive any advance child tax credit payments for 2021, enter -0-	15e	
Caution: If the amount on this line doesn't match the aggregate amounts reported to you (and your spouse if filing jointly) on your Letter(s) 6419, the processing of your return will be delayed.			
f	Subtract line 15e from line 15d. If zero or less, enter -0- on lines 15f through 15h and go to Part III	15f	
g	Enter the smaller of line 15b or line 15f. This is your nonrefundable child tax credit and credit for other dependents. Enter this amount on line 19 of your Form 1040, 1040-SR, or 1040-NR.	15g	
h	Subtract line 15g from line 15f. This is your additional child tax credit. Enter this amount on line 28 of your Form 1040, 1040-SR, or 1040-NR	15h	

Part II-A Additional Child Tax Credit (use only if completing Part I-C)**Caution:** If you file Form 2555, do not complete Parts II-A through II-C; you cannot claim the additional child tax credit.**Caution:** If you checked a box on line 13, do not complete Parts II-A through II-C; you cannot claim the additional child tax credit.

16a	Subtract line 15b from line 12. If zero, skip Parts II-A and II-B and enter -0- on line 27	16a	
b	Number of qualifying children under 18 with the required social security number: _____ x \$1,400. Enter the result. If zero, skip Parts II-A and II-B and enter -0- on line 27	16b	
TIP: The number of children you use for this line is the same as the number of children you used for line 4a.			
17	Enter the smaller of line 16a or line 16b	17	
18a	Earned income (see instructions)	18a	
b	Nontaxable combat pay (see instructions)	18b	
19	Is the amount on line 18a more than \$2,500? <input type="checkbox"/> No. Leave line 19 blank and enter -0- on line 20. <input type="checkbox"/> Yes. Subtract \$2,500 from the amount on line 18a. Enter the result	19	
20	Multiply the amount on line 19 by 15% (0.15) and enter the result	20	
Next. On line 16b, is the amount \$4,200 or more? <input type="checkbox"/> No. If line 20 is zero, enter -0- on line 15c. Otherwise, skip Part II-B and enter the smaller of line 17 or line 20 on line 27. <input type="checkbox"/> Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. Otherwise, go to line 21.			

Part II-B Certain Filers Who Have Three or More Qualifying Children

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

Part II-C Additional Child Tax Credit

27	Enter this amount on line 15c	27	
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Part III Additional Tax (use only if line 14g or line 15f, whichever applies, is zero)

28a	Enter the amount from line 14f or line 15e, whichever applies	28a	2,000.
b	Enter the amount from line 14e or line 15d, whichever applies	28b	0.
29	Excess advance child tax credit payments. Subtract line 28b from line 28a. If zero, stop; you do not owe the additional tax	29	2,000.
30	Enter the number of qualifying children taken into account in determining the annual advance amount you received for 2021. See your Letter 6419 for this number. If you are missing your Letter 6419, you are filing a joint return, or you received more than one Letter 6419, see the instructions before entering a number on this line Caution: If the amount on this line doesn't match the number of qualifying children reported to you (and your spouse if filing jointly) on your Letter(s) 6419, the processing of your return will be delayed.	30	4.
31	Enter the smaller of line 4a or line 30	31	2.
32	Subtract line 31 from line 30. If zero, skip to line 40 and enter the amount from line 29; otherwise, continue to line 33	32	2.
33	Enter the amount shown below for your filing status. <ul style="list-style-type: none"> • Married filing jointly or Qualifying widow(er)—\$60,000 • Head of household—\$50,000 • All other filing statuses—\$40,000 	33	50,000.
34	Subtract line 33 from line 3. If zero or less, enter -0-	34	6,225,703.
35	Enter the amount from line 33	35	50,000.
36	Divide line 34 by line 35. Enter the result as a decimal (rounded to at least three places). If the result is 1.000 or more, enter 1.000	36	1.
37	Multiply line 32 by \$2,000	37	4,000.
38	Multiply line 37 by line 36	38	4,000.
39	Subtract line 38 from line 37	39	0.
40	Subtract line 39 from line 29. If zero or less, enter -0-. This is your additional tax. If more than zero, enter this amount on Schedule 2 (Form 1040), line 19	40	2,000.

BAA

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Schedule 8812 (Form 1040) 2021

Health Savings Accounts (HSAs)▶ **Attach to Form 1040, 1040-SR, or 1040-NR.**▶ **Go to www.irs.gov/Form8889 for instructions and the latest information.**

OMB No. 1545-0074

2021
Attachment
Sequence No. **52**

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

DANIEL L JOHNSON

Social security number of HSA
beneficiary. If both spouses
have HSAs, see instructions ▶

529-95-0491

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 type="checkbox"/> Self-only <input checked="" 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. Do not include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions	2	7,200.
3	If you were under age 55 at the end of 2021 and, on the first day of every month during 2021, you were, or were considered, an eligible individual with the same coverage, enter \$3,600 (\$7,200 for family coverage). All others , see the instructions for the amount to enter	3	7,200.
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	0.
5	Subtract line 4 from line 3. If zero or less, enter -0-	5	7,200.
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	7,200.
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	0.
8	Add lines 6 and 7	8	7,200.
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	7,200.
13	HSA deduction. Enter the smaller of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13 Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.	13	7,200.

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	5,546.
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	5,546.
15	Qualified medical expenses paid using HSA distributions (see instructions)	15	5,546.
16	Taxable HSA distributions. 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 Exceptions to the Additional 20% Tax (see instructions), check here ▶ <input type="checkbox"/>		
b	Additional 20% tax (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	Total income. 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	Additional tax. Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d	21	

Qualified Business Income Deduction

OMB No. 1545-2294

Department of the Treasury
Internal Revenue Service▶ **Attach to your tax return.**▶ **Go to www.irs.gov/Form8995A for instructions and the latest information.****2021**
Attachment
Sequence No. **55A**

Name(s) shown on return

DANIEL L JOHNSON

Your taxpayer identification number

529-95-0491

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 \$164,900 (\$164,925 if married filing separately; \$329,800 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		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
B		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
C		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

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 \$164,900 or less (\$164,925 if married filing separately; \$329,800 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.

REV 09/09/22 PRO

Form **8995-A** (2021)

Part III Phased-in Reduction

Complete Part III only if your taxable income is more than \$164,900 but not \$214,900 (\$164,925 and \$214,925 if married filing separately; \$329,800 and \$429,800 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 \$164,900 (\$164,925 if married filing separately; \$329,800 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	1,305.		
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	1,305.		
31	REIT and PTP component. Multiply line 30 by 20% (0.20)	31	261.		
32	Qualified business income deduction before the income limitation. Add lines 27 and 31	32		261.	
33	Taxable income before qualified business income deduction	33	6,256,232.		
34	Net capital gain. See instructions	34	6,211,587.		
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		44,645.	
36	Income limitation. Multiply line 35 by 20% (0.20)	36		8,929.	
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		261.	
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		261.	
40	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or greater, enter -0-	40	(0.)		

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

▶ Attach to your tax return.

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

OMB No. 1545-2227

2021
Attachment
Sequence No. **72**

Name(s) shown on your tax return

DANIEL L JOHNSON

Your social security number or EIN

529-95-0491

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	3,967.
2	Ordinary dividends (see instructions)	2	51,555.
3	Annuities (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a	-24,807.
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b	24,807.
c	Combine lines 4a and 4b	4c	0.
5a	Net gain or loss from disposition of property (see instructions)	5a	6,206,181.
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	6,206,181.
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	6,261,703.

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	2,275.
c	Miscellaneous investment expenses (see instructions)	9c	
d	Add lines 9a, 9b, and 9c	9d	2,275.
10	Additional modifications (see instructions)	10	
11	Total deductions and modifications. Add lines 9d and 10	11	2,275.

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	6,259,428.
13	Modified adjusted gross income (see instructions)	13	6,275,703.
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	6,075,703.
16	Enter the smaller of line 12 or line 15	16	6,075,703.
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	230,877.
18a	Net investment income (line 12 above)	18a	
b	Deductions for distributions of net investment income and deductions under section 642(c) (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	

Depreciation and Amortization
(Including Information on Listed Property)

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form4562 for instructions and the latest information.

OMB No. 1545-0172

2021Attachment
Sequence No. **179**

Name(s) shown on return

DANIEL L JOHNSON

Business or activity to which this form relates

Section 179 Summary

Identifying number

529-95-0491

Part I Election To Expense Certain Property Under Section 179**Note:** If you have any listed property, complete Part V before you complete Part I.

1 Maximum amount (see instructions)	1	1,050,000.
2 Total cost of section 179 property placed in service (see instructions)	2	
3 Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,620,000.
4 Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	0.
5 Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	1,050,000.
6 (a) Description of property	(b) Cost (business use only)	(c) Elected cost
from Schedule K-1		1.
7 Listed property. Enter the amount from line 29	7	
8 Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	1.
9 Tentative deduction. Enter the smaller of line 5 or line 8	9	1.
10 Carryover of disallowed deduction from line 13 of your 2020 Form 4562	10	
11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions	11	21,200.
12 Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	1.
13 Carryover of disallowed deduction to 2022. Add lines 9 and 10, less line 12 ▶	13	0.

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)**

14 Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year. See instructions.	14	
15 Property subject to section 168(f)(1) election	15	
16 Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Don't include listed property. See instructions.)**Section A**

17 MACRS deductions for assets placed in service in tax years beginning before 2021	17	
18 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

Section B—Assets Placed in Service During 2021 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
i Nonresidential real property			27.5 yrs.	MM	S/L	
			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2021 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 30-year			30 yrs.	MM	S/L	
d 40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21 Listed property. Enter amount from line 28	21	
22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	
23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Complete This Part Before Part I, Lines 2a, 2b, and 2c. See instructions.

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 2a)	(b) Net loss (line 2b)	(c) Unallowed loss (line 2c)	(d) Gain	(e) Loss
BRIDGE OPPORTUNITY ZONE FUND IV LP	0.	4,948.			4,948.
CYNOSURE PARTNERS 2020 PV LP	191.	0.		191.	
GRIFFIN CAPITAL QUALIFIED OPPORTUNITY	0.	157.			157.
Total. Enter on Part I, lines 2a, 2b, and 2c ►	191.	5,105.			

Part VI Use This Part if an Amount Is Shown on Part II, Line 9. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a).
Total ►			1.00		

Part VII Allocation of Unallowed Losses. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
BRIDGE OPPORTUNITY ZONE FUND IV LP	E Ln 28B	4,948.	0.96924584	4,763.
GRIFFIN CAPITAL QUALIFIED OPPORTUNITY	E Ln 28D	157.	0.03075416	151.
Total ►		5,105.	1.00	4,914.

Part VIII Allowed Losses. See instructions.

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
BRIDGE OPPORTUNITY ZONE FUND IV LP	E Ln 28B	4,948.	4,763.	185.
GRIFFIN CAPITAL QUALIFIED OPPORTUNITY	E Ln 28D	157.	151.	6.
Total ►		5,105.	4,914.	191.

Initial and Annual Statement of Qualified Opportunity Fund (QOF) Investments

► Go to www.irs.gov/Form8997 for the latest information.
► Attach to your tax return.

OMB No. 1545-0123

2021
Attachment
Sequence No. **997**

Name **DANIEL L JOHNSON** Tax identification number (see instructions) **529-95-0491**

Part I Total QOF Investment Holdings Due to Deferrals Prior to Beginning of Tax Year
If different from last year's ending QOF investment holdings, attach explanation.

(a) Qualified Opportunity Fund (QOF) EIN	(b) Date QOF investment acquired (MM/DD/YYYY)	(c) Description of QOF investment (for example, 100 shares or 25% interest)	(d) Special gain code	Deferred gain held in QOF	
				(e) Amount of short-term deferred gain remaining in QOF	(f) Amount of long-term deferred gain remaining in QOF
1 Enter the totals, if any, from continuation sheet ►					
2 Enter the totals from columns (e) and (f) ►					

Part II Current Tax Year Capital Gains Deferred by Investing in QOF

(a) Qualified Opportunity Fund (QOF) EIN	(b) Date QOF investment acquired (MM/DD/YYYY)	(c) Description of interest acquired (for example, 100 shares or 25% interest)	(d) Special gain code	Deferred gain invested in QOF	
				(e) Amount of short-term deferred gain remaining in QOF	(f) Amount of long-term deferred gain remaining in QOF
83-3873722	12/10/2021	GTIS QUALIFIED OPPORTUNITY FUND			350,000.
85-4323971	12/31/2021	BRIDGE CAPITAL OPPORTUNITY ZONE			300,000.
85-3274399	12/31/2021	GRIFFIN CAPITAL QUALIFIED OPPORTUNITY			350,000.
1 Enter the totals, if any, from continuation sheet ►					
2 Enter the totals from columns (e) and (f). See instructions for reporting on Form 8949 ►					1,000,000.

Applicability of Special Rules Regarding the Waiver of Certain Treaty Benefits

Are you a foreign eligible taxpayer whose tax year began after March 13, 2020? See instructions for more information.

- ☐ **Yes.** You may not elect to defer tax on an eligible gain by investing in a QOF unless you check "Yes" in response to the next question.
☒ **No.** Skip the next question and go to Part III.

If you are a foreign eligible taxpayer, see the instructions to determine if you are required to attach a written statement for the portion of your first tax year ending after December 21, 2017, and all tax years that began after December 21, 2017, and on or before March 13, 2020.

Waiver of Treaty Benefits on Future Inclusions by a Foreign Eligible Taxpayer (for Tax Years Beginning After March 13, 2020, Only)

Do you hereby irrevocably waive any benefits available under an applicable U.S. income tax convention that would exempt gains that you are deferring by investing in a QOF from being subject to federal income tax at the time of inclusion? See instructions for more information.

- ☐ **Yes.** Report the deferral of the eligible gain in Part II and on Form 8949.
☐ **No.** You may not elect to defer tax on an eligible gain by investing in a QOF. **Do not report the deferral of any otherwise eligible gain in Part II or on Form 8949.**

Part III Inclusion Events and Certain Other Transfers During the Current Tax Year

(a) Qualified Opportunity Fund (QOF) EIN	(b) Date of event (MM/DD/YYYY)	(c) Description of event (for example, sale of 100 shares, gift of 25% interest, or distribution of \$1,000, etc.)	(d) Special gain code	Deferred gain included due to disposition of QOF interest	
				(e) Amount of previously deferred short-term gain now included in taxable income	(f) Amount of previously deferred long-term gain now included in taxable income
1 Enter the totals, if any, from continuation sheet ▶					
2 Enter the totals from columns (e) and (f). See instructions for reporting on Form 8949 ▶					

☐ Check this box if you disposed of any investment(s) and didn't receive a Form 1099-B reporting the disposition from the QOF or other third party. See the Instructions for Form 8949 for reporting requirements of any gain or loss.

Part IV Total QOF Investments Due to Deferrals at Year End (see instructions)

(a) Qualified Opportunity Fund (QOF) EIN	(b) Date QOF investment acquired (MM/DD/YYYY)	(c) Description of interest acquired (for example, 100 shares or 25% interest)	(d) Special gain code	Deferred gain invested in QOF investment	
				(e) Amount of short-term deferred gain invested in QOF	(f) Amount of long-term deferred gain invested in QOF
83-3873722	12/10/2021	GTIS QUALIFIED OPPORTUNITY FUND			350,000.
85-4323971	12/31/2021	BRIDGE CAPITAL OPPORTUNITY ZONE			300,000.
85-3274399	12/31/2021	GRIFFIN CAPITAL QUALIFIED OPPORTUNITY			350,000.
1 Enter the totals, if any, from continuation sheet ▶					
2 Enter the totals from columns (e) and (f) ▶					1,000,000.

**Application for Automatic Extension of Time
To File U.S. Individual Income Tax Return**▶ Go to www.irs.gov/Form4868 for the latest information.

OMB No. 1545-0074

2021

There are three ways to request an automatic extension of time to file a U.S. individual income tax return.

1. You can pay all or part of your estimated income tax due and indicate that the payment is for an extension using Direct Pay, the Electronic Federal Tax Payment System, or using a credit or debit card. See *How To Make a Payment*, later.
2. You can file Form 4868 electronically by accessing IRS e-file using your tax software or by using a tax professional who uses e-file.
3. You can file a paper Form 4868 and enclose payment of your estimate of tax due (optional).



**It's Convenient,
Safe, and Secure**

IRS e-file is the IRS's electronic filing program. You can get an automatic extension of time to file your tax return by filing Form 4868 electronically. You'll receive an electronic acknowledgment once you complete the transaction. Keep it with your records. Don't mail in Form 4868 if you file electronically, unless you're making a payment with a check or money order. See *Pay by Check or Money Order*, later.

Complete Form 4868 to use as a worksheet. If you think you may owe tax when you file your return, you'll need to estimate your total tax liability and subtract how much you've already paid (lines 4, 5, and 6 below).

Several companies offer free e-filing of Form 4868 through the Free File program. For more details, go to www.irs.gov/FreeFile.

**Pay Electronically**

You **don't** need to file Form 4868 if you make a payment using our electronic payment options. The IRS will automatically process an extension of time to file when you pay part or all of your estimated income tax electronically. You can pay online or by phone. See *Making Payments Electronically*, later.

**E-file Using Your Tax Software
or Through a Tax Professional**

Refer to your tax software package or tax preparer for ways to file electronically. Be sure to have a copy of your 2020 tax return—you'll be asked to provide information from the return for taxpayer verification. If you wish to make a payment, you can pay by electronic funds withdrawal or send your check or money order to the address shown in the middle column under *Where To File a Paper Form 4868*, later.

**File a Paper Form 4868**

If you wish to file on paper instead of electronically, fill in the Form 4868 below and mail it to the address shown under *Where To File a Paper Form 4868*, later.

For information on using a private delivery service, see *Private Delivery Services*, later.

Note: If you're a fiscal year taxpayer, you must file a paper Form 4868.

General Instructions**Purpose of Form**

Use Form 4868 to apply for 6 more months (4 if "out of the country" (defined later under *Taxpayers who are out of the country*) and a U.S. citizen or resident) to file Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.

Gift and generation-skipping transfer (GST) tax return (Form 709). An extension of time to file your 2021 calendar year income tax return also extends the time to file Form 709 for 2021. However, it doesn't extend the time to pay any gift and GST tax you may owe for 2021. To make a payment of gift and GST tax, see Form 8892. If you don't pay the amount due by the regular due date for Form 709, you'll owe interest and may also be charged penalties. If the donor died during 2021, see the instructions for Forms 709 and 8892.

Qualifying for the Extension

To get the extra time, you must:

1. Properly estimate your 2021 tax liability using the information available to you,
2. Enter your total tax liability on line 4 of Form 4868, and
3. File Form 4868 by the regular due date of your return.



Although you aren't required to make a payment of the tax you estimate as due, Form 4868 doesn't extend the time to pay taxes. If you don't pay the amount due by the regular due date, you'll owe interest. You may also be charged penalties. For more details, see Interest and Late Payment Penalty, later. Any remittance you make with your application for extension will be treated as a payment of tax.

You don't have to explain why you're asking for the extension. We'll contact you only if your request is denied.

Don't file Form 4868 if you want the IRS to figure your tax or you're under a court order to file your return by the regular due date.

▼ DETACH HERE ▼

**Application for Automatic Extension of Time
To File U.S. Individual Income Tax Return**

For calendar year 2021, or other tax year beginning , 2021, and ending , .

REV 09/09/22 PRO 1555

2021

Part I Identification		Part II Individual Income Tax	
1	DANIEL L JOHNSON	4	Estimate of total tax liability for 2021 . . . \$ 1,482,721.
		5	Total 2021 payments 38,004.
		6	Balance due. Subtract line 5 from line 4. See instructions 1,444,717.
		7	Amount you're paying (see instructions) ▶ 1,450,000.
		8	Check here if you're "out of the country" and a U.S. citizen or resident. See instructions <input type="checkbox"/>
		9	Check here if you file Form 1040-NR and didn't receive wages as an employee subject to U.S. income tax withholding <input type="checkbox"/>

134 SOUTH 1160 WEST CIRCLE
SAINT GEORGE, UT 84770

2
529-95-0491

3

529950491 00 JOHN 30 0 202112 670

► Keep for your records

Name(s) Shown on Return
DANIEL L JOHNSONSocial Security Number
529-95-0491

Form W-2 Employer	SP	Wages	Federal Tax	State Wages	State Tax	
TORKABC LLC		46,007.	5,004.	46,007.	2,280.	
Totals		46,007.	5,004.	46,007.	2,280.	

Form W-2 Summary

Box No.	Description	Taxpayer	Spouse	Total
1	Total wages, tips and compensation:			
	Non-statutory & statutory wages not on Sch C . .	46,007.		46,007.
	Statutory wages reported on Schedule C			
	Foreign wages included in total wages.			
	Unreported tips.	0.		0.
2	Total federal tax withheld	5,004.		5,004.
3 & 7	Total social security wages/tips	52,364.		52,364.
4	Total social security tax withheld	3,247.		3,247.
5	Total Medicare wages and tips	52,364.		52,364.
6	Total Medicare tax withheld	759.		759.
8	Total allocated tips			
9	Not used			
10 a	Total dependent care benefits			
b	Offsite dependent care benefits			
c	Onsite dependent care benefits			
11	Total distributions from nonqualified plans			
12 a	Total from Box 12			
b	Elective deferrals to qualified plans			
c	Roth contrib. to 401(k), 403(b), 457(b) plans . .			
d	Deferrals to government 457 plans			
e	Deferrals to non-government 457 plans			
f	Deferrals 409A nonqual deferred comp plan . .			
g	Income 409A nonqual deferred comp plan . . .			
h	Uncollected Medicare tax			
i	Uncollected social security and RRTA tier 1 . .			
j	Uncollected RRTA tier 2			
k	Income from nonstatutory stock options			
l	Non-taxable combat pay			
m	QSEHRA benefits			
n	Total other items from box 12			
14 a	Total deductible mandatory state tax			
b	Total deductible charitable contributions			
c	Total state deductible employee expenses . . .			
d	Total RR Compensation			
e	Total RR Tier 1 tax			
f	Total RR Tier 2 tax			
g	Total RR Medicare tax			
h	Total RR Additional Medicare tax			
i	Total RRTA tips.			
j	Total other items from box 14			
k	Total sick leave subject to \$511 limit			
l	Total sick leave subject to \$200 limit			
m	Total emergency family leave wages			
16	Total state wages and tips	46,007.		46,007.
17	Total state tax withheld	2,280.		2,280.
19	Total local tax withheld.			

Form 1099-B Worksheet

► Keep for your records

2021

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Name of reporting financial institution ► ZONOS

Acct Number ► Reporter's Tax ID . . . ►

Owner of account ►
Transactions were not reported to IRS . ► ☐

Form 8949 Reporting Exception Transactions

Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.

Box A transactions to report directly on Sch D, Line 1a (short term)

Box D transactions to report directly on Sch D, Line 8a (long term)

(Do not duplicate any transactions summarized above when making entries in the table below.)

Proceeds	Cost Basis

Quick Entry Table

If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet. (See field help for more details.)

Sale#	Property Description		Sales Price (Proceeds)		Cost or Other Basis		Disallowed Wash Sale	
8949 Box	Date Sold	Date Acquired	Basis Reported to IRS?		Reported on Form 1099B?			
Adjustment Amount*	Adjustment Code(s)*	Holding Period						
1	ZONOS							
E	07/31/21	Various	7,125,000.00		0.00			
		L	Yes		X	No	Yes	X
			Yes		No		Yes	
			Yes		No		Yes	
			Yes		No		Yes	
			Yes		No		Yes	

Sale Results for Form 8949

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	E	ZONOS	7,125,000.00	0.00			7,125,000.00	L

Brokerage Statement (Form 1099-B or substitute) Summary Table

This table shows gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with the brokerage statement they may have been reported on. Note that individual sales are rounded off to the nearest dollar. As result, the various summarized values below may differ slightly from statement totals.

Sale Type	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A						
Box B						
Box C						
Box D						
Box E	7,125,000.00	0.00	7,125,000.00		7,125,000.00	
Box F						
Totals	7,125,000.00	0.00	7,125,000.00		7,125,000.00	

Form 8949 and Schedule D Totals*Totals gains/losses as they will appear on Form 8949 and Schedule D.**Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)*

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A					
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E	7,125,000.00	0.00			7,125,000.00
Form 8949, Box F					

Additional Summary Data*Includes summary of withholding found on related Capital Gain (Loss) Adjustment Worksheets.*

Total Federal Backup Withholding _____

State ID

State Backup Withholding _____

Total State Backup Withholding _____

Total Collectible Gain/(Loss) _____

Qualified Small Business (QSB) gain (Sec 1202)	Total Gain	Excluded Gain	Net Gain
Maximum 50% exclusion gain ▶			
Maximum 60% exclusion gain ▶			
Maximum 75% exclusion gain ▶			
Maximum 100% exclusion gain ▶			

PDF AttachmentDoes a statement need to be attached to this return? ☐ Yes ☒ No

Form 1099-B Worksheet

► Keep for your records

2021Name(s) Shown on Return
DANIEL L JOHNSONSocial Security No.
529-95-0491

Name of reporting financial institution ► FIDELITY

Acct Number ► 636-128278 Reporter's Tax ID . . . ► 04-3523567

Owner of account ► T

Transactions were not reported to IRS . ► ☐**Form 8949 Reporting Exception Transactions***Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.*

	Proceeds	Cost Basis
Box A transactions to report directly on Sch D, Line 1a (short term)	194,547.32	194,121.44
Box D transactions to report directly on Sch D, Line 8a (long term)		

(Do **not** duplicate any transactions summarized above when making entries in the table below.)

Quick Entry Table*If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet. (See field help for more details.)*

Sale#	Property Description		Sales Price (Proceeds)		Cost or Other Basis		Disallowed Wash Sale	
8949 Box	Date Sold	Date Acquired	Basis Reported to IRS?		Reported on Form 1099B?			
Adjustment Amount*	Adjustment Code(s)*	Holding Period						
			Yes	No	Yes	No		
			Yes	No	Yes	No		
			Yes	No	Yes	No		
			Yes	No	Yes	No		
			Yes	No	Yes	No		
			Yes	No	Yes	No		
			Yes	No	Yes	No		

Sale Results for Form 8949

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L

Brokerage Statement (Form 1099-B or substitute) Summary Table*This table shows gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with the brokerage statement they may have been reported on. Note that individual sales are rounded off to the nearest dollar. As result, the various summarized values below may differ slightly from statement totals.*

Sale Type	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	194,547.32	194,121.44	425.88		425.88	
Box B						
Box C						
Box D						
Box E						
Box F						
Totals	194,547.32	194,121.44	425.88		425.88	

Form 8949 and Schedule D Totals

Totals gains/losses as they will appear on Form 8949 and Schedule D.

Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a	194,547.32	194,121.44			
Form 8949, Box A					
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

Additional Summary Data

Includes summary of withholding found on related Capital Gain (Loss) Adjustment Worksheets.

Total Federal Backup Withholding _____

State ID

State Backup Withholding _____

Total State Backup Withholding _____

Total Collectible Gain/(Loss) _____

Qualified Small Business (QSB) gain (Sec 1202)	Total Gain	Excluded Gain	Net Gain
Maximum 50% exclusion gain ▶			
Maximum 60% exclusion gain ▶			
Maximum 75% exclusion gain ▶			
Maximum 100% exclusion gain ▶			

PDF AttachmentDoes a statement need to be attached to this return? ☐ Yes ☒ No

Form 1099-B Worksheet

► Keep for your records

2021Name(s) Shown on Return
DANIEL L JOHNSONSocial Security No.
529-95-0491

Name of reporting financial institution ► FIDELITY

Acct Number ► 636-166822 Reporter's Tax ID . . . ► 04-3523567

Owner of account ► T

Transactions were not reported to IRS . ► ☐**Form 8949 Reporting Exception Transactions***Any transactions that are eligible to be reported directly on Schedule D, bypassing Form 8949, may be summarized here.*

Box A transactions to report directly on Sch D, Line 1a (short term)

Box D transactions to report directly on Sch D, Line 8a (long term)

(Do **not** duplicate any transactions summarized above when making entries in the table below.)

Proceeds	Cost Basis

Quick Entry Table*If you have additional sale info to enter for a sale, double-click on any field in the table to QuickZoom to the associated Capital Gain (Loss) Adjustments Worksheet. (See field help for more details.)*

Sale#	Property Description		Sales Price (Proceeds)		Cost or Other Basis	Disallowed Wash Sale
8949 Box	Date Sold	Date Acquired	Basis Reported to IRS?		Reported on Form 1099B?	
Adjustment Amount*	Adjustment Code(s)*	Holding Period				
1	FIDELITY					
A	12/31/21	08/11/21	92,398.67	91,529.46	232.62	
		S	Yes X	No	Yes X	No
			Yes	No	Yes	No
			Yes	No	Yes	No
			Yes	No	Yes	No
			Yes	No	Yes	No

Sale Results for Form 8949

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	A	FIDELITY	92,398.67	91,529.46	W	232.62	1,101.83	S

Brokerage Statement (Form 1099-B or substitute) Summary Table*This table shows gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with the brokerage statement they may have been reported on. Note that individual sales are rounded off to the nearest dollar. As result, the various summarized values below may differ slightly from statement totals.*

Sale Type	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	92,398.67	91,529.46	869.21	232.62	1,101.83	W
Box B						
Box C						
Box D						
Box E						
Box F						
Totals	92,398.67	91,529.46	869.21	232.62	1,101.83	

Form 8949 and Schedule D Totals*Totals gains/losses as they will appear on Form 8949 and Schedule D.**Note that these totals may differ from your statement to comply with IRS rounding instructions. (See help)*

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	92,399.00	91,529.00	233.00	W	1,103.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D					
Form 8949, Box E					
Form 8949, Box F					

Additional Summary Data*Includes summary of withholding found on related Capital Gain (Loss) Adjustment Worksheets.*

Total Federal Backup Withholding _____

State ID

State Backup Withholding _____

Total State Backup Withholding _____

Total Collectible Gain/(Loss) _____

Qualified Small Business (QSB) gain (Sec 1202)	Total Gain	Excluded Gain	Net Gain
Maximum 50% exclusion gain ▶			
Maximum 60% exclusion gain ▶			
Maximum 75% exclusion gain ▶			
Maximum 100% exclusion gain ▶			

PDF AttachmentDoes a statement need to be attached to this return? ☐ Yes ☒ No

Capital Gain (Loss) Adjustments Worksheet

► Keep for your records

2021

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Part I Values for Form 8949

Click on any field in Part I to QuickZoom to its corresponding entry on the Form 1099-B Worksheet.

Form 8949 Box* . . . Description . GTIS QUALIFIED OPPORTUNITY FUND

Date Sold	Date Acquired
Sales Price/Proceeds	Cost Basis
Adjustment Code(s) . . . Z	Adjustment Amount 350,000.00
Gain/(Loss)	Holding Period

*The fields above, other than **Adjustment Code(s)** and **Adjustment Amount**, will typically match their corresponding fields on the Form 1099-B Worksheet. See **Part I** in the help for this form for exceptions. (Form help can be accessed by right-clicking on any field above.)

Part II Manual Adjustments

For adjustments not entered in Part III, the adjustment code(s) and amount may be entered here. Do **not** duplicate code(s) or amounts entered elsewhere. Adjustments requiring entries on forms other than Form 8949 will require manual entries in Part IV, or in some cases, on the specific form.

Adjustment Code(s) . . . Adjustment Amount

☐ The cost basis and proceeds are totals from **multiple sales** (code **M**).

Part III Specific Adjustments

☐ Form 1099-B reports an **incorrect basis** (code **B**). Corrected basis ►
☐ Check this box for **employee stock** sales requiring adjustments.
QuickZoom to Employee Stock Transaction Worksheet if basis is incorrect, compensation income should be reported, or for **all** Incentive Stock Option (ISO) sales ►

Allocated amounts from Employer Stock Transaction Worksheet

a Number of shares
b Date acquired
c Date sold
d Sales price
e Cost or other basis
f Adjustment amount

Short-Term	Long-Term	Total

Note: For employee stock sales with both short-term and long-term components, any adjustments will be ratably allocated on a per share basis. If this is not an accurate allocation for this sale, then report the short- and long-term components separately.

☐ This is a sale of a **collectible** item (code **C**).

☐ Sale includes an **accrued market discount** (code **D**). Amount ►

☐ Amounts reported on Form 1099-B do not reflect **sales fees/expenses** that were charged (code **E**).
Amount of sales fees/expenses ►

This sale cannot generate a loss for the following reason (code **L**):

- ☐ This is a vacation home or other **personal use property** with no business or rental activity.
☐ This is a sale to a **related party**.
☐ This sale is **nondeductible for another reason** (except wash sale).

☐ Any gain/loss from sale should not be included because asset held by a **nominee** (code **N**).
If only part of the gain (loss) is nominee, enter offsetting adjustment here ►

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Part III Specific Adjustments (cont.)

☐ **Other adjustments** are required (code **O**).
Amount (positive to increase gain, negative to reduce) ▶ _____

☐ Loss from this sale is **ordinary loss** from a section 1242 small business (code **O**).
Ordinary loss amount (leave blank if entire loss is ordinary) ▶ _____

☐ Gain from this **Qualified Small Business (QSB)** stock is excludible under IRC section 1202 (code **Q**).
☐ This QSB stock is eligible for **50%** exclusion under section 1202.
☐ This is empowerment zone stock eligible for **60%** exclusion under section 1202.
For 60% exclusion, enter gain as of 12/31/2018 ▶ _____
☐ This QSB stock is eligible for **75%** exclusion under section 1202.
☐ This QSB stock is eligible for **100%** exclusion under section 1202.
Amount of gain eligible for exclusion ▶ _____
Amount of gain excluded ▶ _____

☐ All or part of the gain is deferred due to a **rollover** (code **R**). This includes rollovers of gain from
Qualified Small Business stock and certain stock sold to ESOP plans.
Amount reinvested in qualified stock (leave blank if sold to ESOP/co-op) ▶ _____
Amount of gain deferred ▶ _____

☐ Loss from this sale is **ordinary loss** from a section 1244 small business (code **S**).
Ordinary loss amount (leave blank if entire loss is ordinary) ▶ _____

☐ Form 1099-B reports an **incorrect holding period** (code **T**).

☐ Sale includes a disallowed **wash sale** loss (code **W**). Amount (leave blank if all) . . ▶ _____

☐ Part or all of the gain is from **DC Zone/qualified community assets** eligible for exclusion (code **X**).
Amount of exclusion (leave blank if entire gain should be excluded) ▶ _____

☒ Check this box if this worksheet is used to report an election to defer the tax on an eligible gain
for an investment in a **Qualified Opportunity Fund (QOF)** (report the actual sale of the eligible gain
property on a Form 1099-B Worksheet, Asset Entry Worksheet, etc.). Complete the fields below.
If sold for eligible gain and invested in Qualified Opportunity Fund (QOF):
Cost of QOF investment 350,000.00
Date of QOF investment 12/10/2021
Taxpayer identification number of QOF 83-3873722
Amount of deferred taxable gain 350,000.00
QOF holding period L
Special gain code, if applicable

Part IV Amounts That Will Be Reported on Forms Other Than Form 8949

☐ Check if ordinary gain/loss
☐ FATCA requirement

Federal tax withheld	Collectible gain/loss ▶
State name	Accrued interest to Sch B . . . ▶
State tax withheld	Sec. 1242 loss on Form 4797 . ▶
State identification number	Sec. 1242 loss on Form 4797 . ▶

Capital Gain (Loss) Adjustments Worksheet

► Keep for your records

2021

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Part I Values for Form 8949

Click on any field in Part I to QuickZoom to its corresponding entry on the Form 1099-B Worksheet.

Form 8949 Box* . . . Description . BRIDGE CAPITAL OPPORTUNITY ZONE

Date Sold Date Acquired
Sales Price/Proceeds Cost Basis
Adjustment Code(s) . . . Z Adjustment Amount 300,000.00
Gain/(Loss) Holding Period

*The fields above, other than **Adjustment Code(s)** and **Adjustment Amount**, will typically match their corresponding fields on the Form 1099-B Worksheet. See **Part I** in the help for this form for exceptions. (Form help can be accessed by right-clicking on any field above.)

Part II Manual Adjustments

For adjustments not entered in Part III, the adjustment code(s) and amount may be entered here. Do **not** duplicate code(s) or amounts entered elsewhere. Adjustments requiring entries on forms other than Form 8949 will require manual entries in Part IV, or in some cases, on the specific form.

Adjustment Code(s) . . . Adjustment Amount

☐ The cost basis and proceeds are totals from **multiple sales** (code **M**).

Part III Specific Adjustments

☐ Form 1099-B reports an **incorrect basis** (code **B**). Corrected basis ►
☐ Check this box for **employee stock** sales requiring adjustments.
QuickZoom to **Employee Stock Transaction Worksheet** if basis is incorrect, compensation income should be reported, or for **all** Incentive Stock Option (ISO) sales ►

Allocated amounts from Employer Stock Transaction Worksheet

a Number of shares
b Date acquired
c Date sold
d Sales price
e Cost or other basis
f Adjustment amount

Short-Term	Long-Term	Total

Note: For employee stock sales with both short-term and long-term components, any adjustments will be ratably allocated on a per share basis. If this is not an accurate allocation for this sale, then report the short- and long-term components separately.

☐ This is a sale of a **collectible** item (code **C**).

☐ Sale includes an **accrued market discount** (code **D**). Amount ►

☐ Amounts reported on Form 1099-B do not reflect **sales fees/expenses** that were charged (code **E**).
Amount of sales fees/expenses ►

This sale cannot generate a loss for the following reason (code **L**):

- ☐ This is a vacation home or other **personal use property** with no business or rental activity.
☐ This is a sale to a **related party**.
☐ This sale is **nondeductible for another reason** (except wash sale).

☐ Any gain/loss from sale should not be included because asset held by a **nominee** (code **N**).
If only part of the gain (loss) is nominee, enter offsetting adjustment here ►

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Part III Specific Adjustments (cont.)

☐ **Other adjustments** are required (code **O**).
Amount (positive to increase gain, negative to reduce) ▶ _____

☐ Loss from this sale is **ordinary loss** from a section 1242 small business (code **O**).
Ordinary loss amount (leave blank if entire loss is ordinary) ▶ _____

☐ Gain from this **Qualified Small Business (QSB)** stock is excludible under IRC section 1202 (code **Q**).
☐ This QSB stock is eligible for **50%** exclusion under section 1202.
☐ This is empowerment zone stock eligible for **60%** exclusion under section 1202.
For 60% exclusion, enter gain as of 12/31/2018 ▶ _____
☐ This QSB stock is eligible for **75%** exclusion under section 1202.
☐ This QSB stock is eligible for **100%** exclusion under section 1202.
Amount of gain eligible for exclusion ▶ _____
Amount of gain excluded ▶ _____

☐ All or part of the gain is deferred due to a **rollover** (code **R**). This includes rollovers of gain from
Qualified Small Business stock and certain stock sold to ESOP plans.
Amount reinvested in qualified stock (leave blank if sold to ESOP/co-op) ▶ _____
Amount of gain deferred ▶ _____

☐ Loss from this sale is **ordinary loss** from a section 1244 small business (code **S**).
Ordinary loss amount (leave blank if entire loss is ordinary) ▶ _____

☐ Form 1099-B reports an **incorrect holding period** (code **T**).

☐ Sale includes a disallowed **wash sale** loss (code **W**). Amount (leave blank if all) . . ▶ _____

☐ Part or all of the gain is from **DC Zone/qualified community assets** eligible for exclusion (code **X**).
Amount of exclusion (leave blank if entire gain should be excluded) ▶ _____

☒ Check this box if this worksheet is used to report an election to defer the tax on an eligible gain
for an investment in a **Qualified Opportunity Fund (QOF)** (report the actual sale of the eligible gain
property on a Form 1099-B Worksheet, Asset Entry Worksheet, etc.). Complete the fields below.
If sold for eligible gain and invested in Qualified Opportunity Fund (QOF):
Cost of QOF investment 300,000.00
Date of QOF investment 12/31/2021
Taxpayer identification number of QOF 85-4323971
Amount of deferred taxable gain 300,000.00
QOF holding period L
Special gain code, if applicable

Part IV Amounts That Will Be Reported on Forms Other Than Form 8949

☐ Check if ordinary gain/loss
☐ FATCA requirement

Federal tax withheld	Collectible gain/loss ▶
State name	Accrued interest to Sch B . . . ▶
State tax withheld	Sec. 1242 loss on Form 4797 . ▶
State identification number	Sec. 1244 loss on Form 4797 . ▶

Capital Gain (Loss) Adjustments Worksheet

► Keep for your records

2021

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Part I Values for Form 8949

Click on any field in Part I to QuickZoom to its corresponding entry on the Form 1099-B Worksheet.

Form 8949 Box* . . . Description . GRIFFIN CAPITAL QUALIFIED OPPORTUNITY

Date Sold	Date Acquired
Sales Price/Proceeds	Cost Basis
Adjustment Code(s) . . . Z	Adjustment Amount 350,000.00
Gain/(Loss)	Holding Period

*The fields above, other than **Adjustment Code(s)** and **Adjustment Amount**, will typically match their corresponding fields on the Form 1099-B Worksheet. See **Part I** in the help for this form for exceptions. (Form help can be accessed by right-clicking on any field above.)

Part II Manual Adjustments

For adjustments not entered in Part III, the adjustment code(s) and amount may be entered here. Do **not** duplicate code(s) or amounts entered elsewhere. Adjustments requiring entries on forms other than Form 8949 will require manual entries in Part IV, or in some cases, on the specific form.

Adjustment Code(s) . . . Adjustment Amount

☐ The cost basis and proceeds are totals from **multiple sales** (code **M**).

Part III Specific Adjustments

☐ Form 1099-B reports an **incorrect basis** (code **B**). Corrected basis ►
☐ Check this box for **employee stock** sales requiring adjustments.
QuickZoom to Employee Stock Transaction Worksheet if basis is incorrect, compensation income should be reported, or for **all** Incentive Stock Option (ISO) sales ►

Allocated amounts from **Employer Stock Transaction Worksheet**

a Number of shares
b Date acquired
c Date sold
d Sales price
e Cost or other basis
f Adjustment amount

Short-Term	Long-Term	Total

Note: For employee stock sales with both short-term and long-term components, any adjustments will be ratably allocated on a per share basis. If this is not an accurate allocation for this sale, then report the short- and long-term components separately.

☐ This is a sale of a **collectible** item (code **C**).

☐ Sale includes an **accrued market discount** (code **D**). Amount ►

☐ Amounts reported on Form 1099-B do not reflect **sales fees/expenses** that were charged (code **E**).
Amount of sales fees/expenses ►

This sale cannot generate a loss for the following reason (code **L**):

☐ This is a vacation home or other **personal use property** with no business or rental activity.
☐ This is a sale to a **related party**.
☐ This sale is **nondeductible for another reason** (except wash sale).

☐ Any gain/loss from sale should not be included because asset held by a **nominee** (code **N**).
If only part of the gain (loss) is nominee, enter offsetting adjustment here ►

Name(s) Shown on Return
DANIEL L JOHNSON

Social Security No.
529-95-0491

Part III Specific Adjustments (cont.)

☐ **Other adjustments** are required (code **O**).
Amount (positive to increase gain, negative to reduce) ▶ _____

☐ Loss from this sale is **ordinary loss** from a section 1242 small business (code **O**).
Ordinary loss amount (leave blank if entire loss is ordinary) ▶ _____

☐ Gain from this **Qualified Small Business (QSB)** stock is excludible under IRC section 1202 (code **Q**).
☐ This QSB stock is eligible for **50%** exclusion under section 1202.
☐ This is empowerment zone stock eligible for **60%** exclusion under section 1202.
For 60% exclusion, enter gain as of 12/31/2018 ▶ _____
☐ This QSB stock is eligible for **75%** exclusion under section 1202.
☐ This QSB stock is eligible for **100%** exclusion under section 1202.
Amount of gain eligible for exclusion ▶ _____
Amount of gain excluded ▶ _____

☐ All or part of the gain is deferred due to a **rollover** (code **R**). This includes rollovers of gain from
Qualified Small Business stock and certain stock sold to ESOP plans.
Amount reinvested in qualified stock (leave blank if sold to ESOP/co-op) ▶ _____
Amount of gain deferred ▶ _____

☐ Loss from this sale is **ordinary loss** from a section 1244 small business (code **S**).
Ordinary loss amount (leave blank if entire loss is ordinary) ▶ _____

☐ Form 1099-B reports an **incorrect holding period** (code **T**).

☐ Sale includes a disallowed **wash sale** loss (code **W**). Amount (leave blank if all) . . ▶ _____

☐ Part or all of the gain is from **DC Zone/qualified community assets** eligible for exclusion (code **X**).
Amount of exclusion (leave blank if entire gain should be excluded) ▶ _____

☒ Check this box if this worksheet is used to report an election to defer the tax on an eligible gain
for an investment in a **Qualified Opportunity Fund (QOF)** (report the actual sale of the eligible gain
property on a Form 1099-B Worksheet, Asset Entry Worksheet, etc.). Complete the fields below.
If sold for eligible gain and invested in Qualified Opportunity Fund (QOF):
Cost of QOF investment 350,000.00
Date of QOF investment 12/31/2021
Taxpayer identification number of QOF 85-3274399
Amount of deferred taxable gain 350,000.00
QOF holding period L
Special gain code, if applicable

Part IV Amounts That Will Be Reported on Forms Other Than Form 8949

☐ Check if ordinary gain/loss
☐ FATCA requirement

Federal tax withheld	Collectible gain/loss ▶
State name	Accrued interest to Sch B . . . ▶
State tax withheld	Sec. 1242 loss on Form 4797 . ▶
State identification number	Sec. 1244 loss on Form 4797 . ▶

Additional information from your 2021 Federal Tax Return

Schedule E: Supplemental Income and Loss

Line 28: Income or Loss from Partnership and S corporations

Continuation Statement

L 2 7 T	Name	Cod e	For eig n	EIN	Basi s Com p	Not At Ris k	Passive Loss Allowed Amt	Passive Income Amt	Nonpassiv e Loss Amt	Sec 179 Expense Dedn Amt	Nonpassiv e Income Amt
D	GRIFFIN CAPITAL QUALIFIED OPPORTUNITY	P		85-3274399			6.				
E	TORKABC, LLC	S		81-1144841					24,807.		
Total							6.		24,807.		

Form 1116: Foreign Tax Credit

Foreign Taxes (A)

Line 3

Explanation Statement

Other Deduction Statement

CLAIMING FOREIGN TAX

40101

1555

Utah State Tax Commission
Utah Individual Income Tax Return
 All State Income Tax Dollars Fund Education

2021
TC-40

INTUIT

• Amended Return - enter code: (see instructions)

Full-yr Resident?

Your Social Security No.

Your first name

Your last name

Y/N

529950491

DANIEL

JOHNSON

Y

Spouse's Soc. Sec. No.

Spouse's first name

Spouse's last name

Address

Telephone number

If deceased, complete
page 3, Part 1

134 SOUTH 1160 WEST CIRCLE

City

State

ZIP+4

Foreign country (if not U.S.)

SAINT GEORGE

UT

84770

1 Filing Status - enter code

1 = Single

• 4 2 = Married filing jointly

3 = Married filing separately

4 = Head of household

5 = Qualifying widow(er)

If using code 2 or 3, enter spouse's name and SSN above

2 Qualifying Dependents

a 2 Dependents age 16 and under

b Other dependents

c 2 Total (add lines a and b)

Dependents must be claimed for the child tax credit on your federal return. See instructions.

3 Election Campaign Fund

Does not increase your tax or reduce your refund.

Enter the code for the party of your choice. Yourself Spouse

See instructions for code letters or go to incometax.utah.gov/elect.

If no contribution, enter N.

4	Federal adjusted gross income from federal return	• 4	6275703
5	Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)	• 5	
6	Total income - add line 4 and line 5	6	6275703
7	State tax refund included on federal form 1040, Schedule 1, line 1 (if any)	• 7	
8	Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)	• 8	
9	Utah taxable income (loss) - subtract the sum of lines 7 and 8 from line 6	• 9	6275703
10	Utah tax - multiply line 9 by 4.95% (.0495) (not less than zero)	• 10	310647
11	Utah personal exemption (multiply line 2c by \$1,750)	• 11	3500
12	Federal standard or itemized deductions	• 12	19471
13	Add line 11 and line 12	13	22971
14	State income tax included in federal itemized deductions	• 14	2280
15	Subtract line 14 from line 13	15	20691
16	Initial credit before phase-out - multiply line 15 by 6% (.06)	• 16	1241
17	Enter: \$15,095 (if single or married filing separately); \$22,643 (if head of household); or \$30,190 (if married filing jointly or qualifying widower)	• 17	22643
18	Income subject to phase-out - subtract line 17 from line 9 (not less than zero)	18	6253060
19	Phase-out amount - multiply line 18 by 1.3% (.013)	• 19	81290
20	Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)	• 20	0
21	If you are a qualified exempt taxpayer, enter "X" (complete worksheet in instr.)	• 21	
22	Utah income tax - subtract line 20 from line 10 (not less than zero)	• 22	310647

Electronic filing
 is quick, easy and
 free, and will
 speed up your refund.

To learn more,
 go to
tap.utah.gov

Utah Individual Income Tax Return (continued)

40102 SSN 529950491 Last name JOHNSON

INTUIT

TC-40
2021

Pg. 2

23	Enter tax from TC-40, page 1, line 22	23	310647
24	Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)	• 24	
25	Full-year resident, subtract line 24 from line 23 (not less than zero) Non or Part-year resident, complete and enter the UTAH TAX from TC-40B, line 41	• 25	310647
26	Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1)	• 26	
27	Subtract line 26 from line 25 (not less than zero)	27	310647
28	Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3)	• 28	
29	AMENDED RETURN ONLY - previous refund	• 29	
30	Recapture of low-income housing credit	• 30	
31	Utah use tax	• 31	
32	Total tax, use tax and additions to tax (add lines 27 through 31)	32	310647
33	Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1)	• 33	2280
34	Credit for Utah income taxes prepaid from TC-546 and 2020 refund applied to 2021	• 34	310000
35	Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2)	• 35	
36	Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2)	• 36	
37	AMENDED RETURN ONLY - previous payments	• 37	
38	Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)	• 38	
39	Total withholding and refundable credits - add lines 33 through 38	39	312280
40	TAX DUE - subtract line 39 from line 32 (not less than zero)	• 40	
41	Penalty and interest (see instructions)	41	
42	TOTAL DUE - PAY THIS AMOUNT - add line 40 and line 41	• 42	
43	REFUND - subtract line 32 from line 39 (not less than zero)	• 43	1633
44	Voluntary subtractions from refund (not greater than line 43) Enter the total from page 3, Part 5	• 44	
45	DIRECT DEPOSIT YOUR REMAINING REFUND - provide account information (see instructions for foreign accounts)		
	• Routing number 324377516 • Account number 746008009573	Account type: • <input checked="" type="checkbox"/> checking • <input type="checkbox"/> savings	

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules are true, correct and complete.

SIGN Your signature		Date	Spouse's signature (if filing jointly)		Date
HERE					
Third Party Designee	Name of designee (if any) you authorize to discuss this return		Designee's telephone number	Designee PIN	
	NATE STAHELI		4356568138	• 11111	
Paid	Preparer's signature		Date	Preparer's telephone number	Preparer's PTIN
				4356568138	• P00296497
Preparer's Section	Firm's name and address		Preparer's EIN		
	STAHELI & JACOBSEN CPA'S PO BOX 911030 SAINT GEORGE UT 84791		• 270372684		

Attach TC-40 page 3 if you: are filing for a deceased taxpayer, are filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, want to deposit into a my529 account, want to apply all/part of your refund to next year's taxes, want to direct deposit to a foreign account, or no longer qualify for a homeowner's exemption.

REV 04/23/22 PRO

Line Explanations	IMPORTANT
1 Employer/payer ID number from W-2 box "b" or 1099 2 Utah withholding ID number from W-2 box "15" or 1099 (14 characters, ending in WTH, no hyphens) 3 Employer/payer name and address from W-2 box "c" or 1099 4 Enter "X" if reporting Utah withholding from form 1099 5 Employee's Social Security number from W-2 box "a" or 1099 6 Utah wages or income from W-2 box "16" or 1099 7 Utah withholding tax from W-2 box "17" or 1099	Do not send your W-2s or 1099s with your return. Instead enter W-2 or 1099 information below, but only if there is Utah withholding on the form. Use additional forms TC-40W if you have more than four W-2s and/or 1099s with Utah withholding tax. Enter mineral production withholding from TC-675R in Part 2 of TC-40W; enter pass-through entity withholding in Part 3 of TC-40W.
First W-2 or 1099 1 811144841 2 14111128003WTH (14 characters, no hyphens) 3 TORKABC LLC 134 SOUTH 1160 WEST CIRCLE SAINT GEORGE UT84770 4 5 529950491 6 46007. 7 2280.	Second W-2 or 1099 1 2 (14 characters, no hyphens) 3 4 5 6 7
Third W-2 or 1099 1 2 (14 characters, no hyphens) 3 4 5 6 7	Fourth W-2 or 1099 1 2 (14 characters, no hyphens) 3 4 5 6 7

Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33: 2280 .

Submit page ONLY if data entered.
Attach completed schedule to your Utah Income Tax Return.
Do not attach W-2s or 1099s to your Utah return.

Individual Income Tax Prepayment Coupon (This is NOT an extension form)TC-546
INTUIT Rev. 4/13**Prepayment**

Use this form to make individual income tax prepayments toward your tax liability prior to the due date of your return. Prepayments may not be necessary if taxes are withheld (W-2, TC-675R, etc.), the previous year's refund was applied to the current year, or you have credit carryovers. Use the worksheet to see if you must make a payment.

Automatic Extensions

You automatically have a six month extension to file your Utah individual income tax return - **NOT** to pay your taxes. **No extension form is required.** Use this form only to make a prepayment.

Extension Penalty

If you do not make the required tax payments by the original return due date a penalty of 2% of the unpaid tax will be assessed for each month of the extension period. The required payment must equal the lesser of 90% of your current year tax liability or 100% of your previous year tax liability. A late filing penalty will be imposed if the return is filed after the extension due date. Interest will accrue on any tax not paid by the original due date.

Interest

Interest will be assessed from the original due date of the return until the tax is paid in full. See Pub 58, *Utah Interest and Penalties at tax.utah.gov/forms* for information on how to calculate the interest.

Where to File

Mail or deliver the coupon below with your payment to:

Income Tax Prepayment
Utah State Tax Commission
210 N 1950 W
Salt Lake City, UT 84134-0266

For more information

801-297-2200, 1-800-662-4335 (if outside the Salt Lake area),
tax.utah.gov.

Electronic Payment

You may pay your tax due online at tap.utah.gov.

Payment Worksheet

Use this worksheet to calculate your minimum required prepayment. Pay the amount on line 9 on or before the return due date.

1. Tax you expect to owe this year 1 310647
2. Minimum payment rate 2 x .90
3. Multiply line 1 by the rate on line 2 3 279582
4. Utah tax liability for the previous year
(as filed, amended or audited) 4 0
5. Minimum tax due by original due date -
enter the lesser of line 3 or line 4 5 0
6. Utah income tax withheld from forms W-2,
1099, or TC-675R, etc. for this year 6 2280
7. Previous prepayments made for this year,
credit carryovers, and prior year refund
applied 7 0
8. Total prepayments for this year -
(add lines 6 and 7) 8 2280
9. Minimum payment due -
(subtract line 8 from line 5) 9 0
 - If less than zero, enter "0". Do not file the coupon if you are not making a prepayment.
 - If greater than zero, enter amount from line 9 on coupon below and send coupon with payment. By remitting the amount on line 9, no extension penalty will be assessed. However, other penalties may apply. See Pub 58.

Note: Interest will still be assessed on any tax not paid by the original due date.

Do not file this coupon if your tax liability on line 9 is zero or if you are getting a refund.

SEPARATE AND RETURN ONLY THE BOTTOM COUPON WITH PAYMENT. KEEP TOP PORTION FOR YOUR RECORDS.

Individual Income Tax Prepayment Coupon

Tax year ending

2021

USTC Use Only

Mail to: Utah State Tax Commission, 210 N 1950 W, SLC UT 84134-0266

INTUIT TC-546
Rev. 4/13Primary taxpayer name
DANIEL L JOHNSONSocial Security no.
529950491

Secondary taxpayer name

Social Security no.

Address

134 SOUTH 1160 WEST CIRCLE

City

SAINT GEORGE

State

UT

ZIP code

84770

Prepayment amount enclosed

\$ 310000 00

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Make check or money order payable to the Utah State Tax Commission.
Do not send cash. Do not staple check to coupon. Detach check stub.

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STATE REQUIRED INFORMATION

State Required Information

The Utah State Tax Commission requires the following information be presented to all taxpayers:

Refund Status: Due to our efforts to protect your identity, please allow 120 days from the date you filed your return or March 1, whichever is later, to process your return and refund request. Please remember that the Utah State Tax Commission cannot issue refunds before March 1st if it cannot verify your W-2s with your employers. Use the "Where's My Refund?" tool to track the status of your refund.
<https://incometax.utah.gov/refunds>

Tax Dues Expectations: Taxes are due 04/18/2022. You get an automatic six month extension to file. If you file during the extension period, you must pay by the due date. Payments received after the due date are subject to penalty and interest. Payments can be made online at tap.utah.gov by electronic check (ACH debit) or credit card (credit card payments are subject to a service fee). You may also mail a check or money order to payable to the "Utah State Tax Commission" with your return. Include the Utah form TC-547 payment coupon with your payment.