**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

Form 1040 U.S. Individual Income Tax Return 2021 Department of the Treasury—Internal Revenue Service (99)OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box.

Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW) 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 a

Your first name and middle initial Last name Your social security number

DANIEL L

JOHNSON 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. |
| --- |

Presidential Election Campaign Check here if you, or your

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code SAINT GEORGE UT 84770 Foreign country name Foreign province/state/county Foreign postal code

spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund.

You Spouse

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? Yes No

Standard Deduction

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

Age/Blindness You: Were born before January 2, 1957 Are blind Spouse: Was born before January 2, 1957 Is blind

Dependents (see instructions):

| (2) Social security  number | **Y**  (3) Relationship  to you | (4)  Child tax credit |
| --- | --- | --- |
| 647-21-1693 | Daughter |  |
| 868-70-5632 | Daughter |  |
|  |  |  |
|  |  |  |

if qualifies for (see instructions):

If more

than four

dependents, see instructions and check

here a

(1) First name Last name Credit for other dependents PEPYR L JOHNSON

QUINN D JOHNSON

**C~~O~~~~P~~**

Attach Sch. B if required.

1 Wages, salaries, tips, etc. Attach Form(s) W-2 ................

2a Tax-exempt interest . . . 2a b Taxable interest .....

| 3a | 10,528. |
| --- | --- |
| 4a |  |
| 5a |  |

3a Qualified dividends . . . b Ordinary dividends ..... 4a IRA distributions .... b Taxable amount ...... 5a Pensions and annuities . . b Taxable amount ......

| 1 |
| --- |
| 2b |
| 3b |
| 4b |
| 5b |

46,007. 3,967. 51,555.

Standard

Deduction for—

6a Social security benefits . . 6a b Taxable amount ...... 6b 7 Capital gain or (loss). Attach Schedule D if required. If not required, check here .... a 7

6,206,181.

• Single or

Married filing separately, $12,550

• Married filing jointly or

Qualifying

8 Other income from Schedule 1, line 10 .................. 9 Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income ......... a 10 Adjustments to income from Schedule 1, line 26 ............... 11 Subtract line 10 from line 9. This is your adjusted gross income ......... a

| 8 |
| --- |
| 9 |
| 10 |
| 11 |
| 12c |
| 13 |
| 14 |
| 15 |

-24,807. 6,282,903. 7,200.

6,275,703.

widow(er),

12a Standard deduction or itemized deductions (from Schedule A) . . 12a

19,471.

$25,100 • Head of

b Charitable contributions if you take the standard deduction (see instructions)

| 12b |  |
| --- | --- |

household,

$18,800

• If you checked any box under *Standard*

*Deduction,*

see instructions.

c Add lines 12a and 12b ....................... 13 Qualified business income deduction from Form 8995 or Form 8995-A ......... 14 Add lines 12c and 13 ....................... 15 Taxable income. Subtract line 14 from line 11. If zero or less, enter -0- .........

19,471.

261.

19,732.

6,255,971.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Form 1040 (2021)

Form 1040 (2021) Page 2

16 Tax (see instructions). Check if any from Form(s): 1 8814 2 4972 3 . . 17 Amount from Schedule 2, line 3 .................... 18 Add lines 16 and 17 . . . . . . . . . . . . . . . . . . . . . . . . 19 Nonrefundable child tax credit or credit for other dependents from Schedule 8812 ..... 20 Amount from Schedule 3, line 8 .................... 21 Add lines 19 and 20 ........................ 22 Subtract line 21 from line 18. If zero or less, enter -0- .............. 23 Other taxes, including self-employment tax, from Schedule 2, line 21 ......... 24 Add lines 22 and 23. This is your total tax ................ a 25 Federal income tax withheld from:

| 16 |
| --- |
| 17 |
| 18 |
| 19 |
| 20 |
| 21 |
| 22 |
| 23 |
| 24 |
| 25d |
| 26 |
| 32 |
| 33 |

1,224,433. 7,819.

1,232,252.

840.

840.

1,231,412. 232,877. 1,464,289.

a Form(s) W-2 .................. 25a

5,004.

b Form(s) 1099 .................. c Other forms (see instructions) .............

| 25b |  |
| --- | --- |
| 25c |  |

d Add lines 25a through 25c ...................... 26 2021 estimated tax payments and amount applied from 2020 return .......... If you have a

5,004. 33,000.

qualifying child,

27a Earned income credit (EIC) .............. 27a

attach Sch. 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 a b Nontaxable combat pay election .... 27b

| 28 |  |
| --- | --- |
| 29 |  |
| 30 |  |
| 31 | 1,450,000. |

**~~COP~~Y**

c Prior year (2019) earned income .... 27c

28 Refundable child tax credit or additional child tax credit from Schedule 8812

29 American opportunity credit from Form 8863, line 8 .......

30 Recovery rebate credit. See instructions ..........

31 Amount from Schedule 3, line 15 ............

32 Add lines 27a and 28 through 31. These are your total other payments and refundable credits a 33 Add lines 25d, 26, and 32. These are your total payments ........... a Refund 34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid . . 34 35a Amount of line 34 you want refunded to you. If Form 8888 is attached, check here . . . a 35a

1,450,000. 1,488,004. 23,715.

23,112.

Direct deposit?

3 2 4 3 7 7 5 1 6

a b Routing number a c Type: Checking Savings

|  |
| --- |
| 37 |
|  |

See instructions.

a 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 .. a

| 36 |
| --- |

Amount

37 Amount you owe. Subtract line 33 from line 24. For details on how to pay, see instructions . a

You Owe Third Party

38 Estimated tax penalty (see instructions) ......... a 38 Do you want to allow another person to discuss this return with the IRS? See

603.

Designee

instructions .................... a Yes. Complete below. No

Designee’s

Phone

Personal identification

name a

NATE STAHELI (435)656-8138 1 1 1 1 1

no. a

number (PIN) a

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. F

Your signature Date Your occupation If the IRS sent you an Identity Protection PIN, enter it here

Joint return? See instructions.

SALES

| Date | Spouse’s occupation |
| --- | --- |

(see inst.) a

Keep a copy for your records.

Paid

Spouse’s signature. If a joint return, both must sign. If the IRS sent your spouse an Identity Protection PIN, enter it here

(see inst.) a

Phone no. Email address

| Preparer’s signature | Date | PTIN  P00296497 |
| --- | --- | --- |

Preparer’s name Check if:

Preparer Use Only

NATE STAHELI

STAHELI & JACOBSEN CPA'S

Firm’s name a Phone no. PO BOX 911030 SAINT GEORGE UT 84791

Self-employed

(435)656-8138 27-0372684

Firm’s address a Firm’s EIN a Go to *www.irs.gov/Form1040* for instructions and the latest information. Form 1040 (2021) **BAA** REV 09/09/22 PRO

SCHEDULE 1

OMB No. 1545-0074

(Form 1040) 2021 Additional Income and Adjustments to Income

Department of the Treasury Internal Revenue Service

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

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

Attachment

Sequence No. 01

Name(s) shown on Form 1040, 1040-SR, or 1040-NR Your social security number DANIEL L JOHNSON 529-95-0491 Part I Additional Income

| 1 |
| --- |
| 2a |
| 3 |
| 4 |
| 5 |
| 6 |
| 7 |
| 9 |
| 10 |

1 Taxable refunds, credits, or offsets of state and local income taxes ....... 2a Alimony received ........................... b Date of original divorce or separation agreement (see instructions) a

3 Business income or (loss). Attach Schedule C ............... 4 Other gains or (losses). Attach Form 4797 ................. 5 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E .............................

6 Farm income or (loss). Attach Schedule F ................. 7 Unemployment compensation ......................

-24,807.

8 Other income:

**COPY**

a Net operating loss .................. 8a ( )

b Gambling income ................... c Cancellation of debt .................. d Foreign earned income exclusion from Form 2555 ..... e Taxable Health Savings Account distribution ........ f Alaska Permanent Fund dividends ............ g Jury duty pay .................... h Prizes and awards .................. i Activity not engaged in for profit income ......... j Stock options ....................

| 8b |  |
| --- | --- |
| 8c |  |
| 8d | ( ) |
| 8e |  |
| 8f |  |
| 8g |  |
| 8h |  |
| 8i |  |
| 8j |  |
| 8k |  |
| 8l |  |
| 8m |  |
| 8n |  |
| 8o |  |
| 8p |  |
| 8z |  |

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 ......................

l Olympic and Paralympic medals and USOC prize money (see instructions) .....................

m Section 951(a) inclusion (see instructions) .........

n Section 951A(a) inclusion (see instructions) ........

o Section 461(l) excess business loss adjustment .......

p Taxable distributions from an ABLE account (see instructions) .

z Other income. List type and amount a

9 Total other income. Add lines 8a through 8z ................ 10 Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8 ...........................

-24,807.

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule 1 (Form 1040) 2021

Schedule 1 (Form 1040) 2021 Page 2 Part II Adjustments to Income

| 11 |
| --- |
| 12 |
| 13 |
| 14 |
| 15 |
| 16 |
| 17 |
| 18 |
| 19a |
| 20 |
| 21 |
| 22 |
| 23 |
| 25 |
| 26 |

11 Educator expenses .......................... 12 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 . . .....................

13 Health savings account deduction. Attach Form 8889 ............ 14 Moving expenses for members of the Armed Forces. Attach Form 3903 ..... 15 Deductible part of self-employment tax. Attach Schedule SE ......... 16 Self-employed SEP, SIMPLE, and qualified plans .............. 17 Self-employed health insurance deduction ................. 18 Penalty on early withdrawal of savings .................. 19a Alimony paid .............................

b Recipient’s SSN .................... a

c Date of original divorce or separation agreement (see instructions) a

**COPY**

20 IRA deduction ............................ 21 Student loan interest deduction ..................... 22 Reserved for future use ........................ 23 Archer MSA deduction ......................... 24 Other adjustments:

a Jury duty pay (see instructions) ............. 24a

7,200.

b Deductible expenses related to income reported on line 8k from the rental of personal property engaged in for profit ..... c Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8l .....

d Reforestation amortization and expenses ......... e Repayment of supplemental unemployment benefits under the Trade Act of 1974 ...................

f Contributions to section 501(c)(18)(D) pension plans ..... g Contributions by certain chaplains to section 403(b) plans . . h Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions) ......

| 24b |  |
| --- | --- |
| 24c |  |
| 24d |  |
| 24e |  |
| 24f |  |
| 24g |  |
| 24h |  |
| 24i |  |
| 24j |  |
| 24k |  |
| 24z |  |

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 ..............

j Housing deduction from Form 2555 ...........

k Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041) . . . ..................

z Other adjustments. List type and amount a

25 Total other adjustments. Add lines 24a through 24z ............. 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 .....

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7,200.

Schedule 1 (Form 1040) 2021

SCHEDULE 2

OMB No. 1545-0074

(Form 1040)2021 Additional Taxes

Department of the Treasury Internal Revenue Service

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

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

Attachment

Sequence No. 02

Name(s) shown on Form 1040, 1040-SR, or 1040-NR Your social security number DANIEL L JOHNSON 529-95-0491 Part I Tax

| 1 |
| --- |
| 2 |
| 3 |

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

| 4 |
| --- |
| 7 |
| 8 |
| 9 |
| 10 |
| 11 |
| 12 |
| 13 |
| 14 |
| 15 |
| 16 |

4 Self-employment tax. Attach Schedule SE ................. 5 Social security and Medicare tax on unreported tip income.

Attach Form 4137 .................. 5

7,819. 7,819.

6 Uncollected social security and Medicare tax on wages. Attach Form 8919 .....................

| 6 |  |
| --- | --- |

**COPY**

7 Total additional social security and Medicare tax. Add lines 5 and 6 ...... 8 Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required 9 Household employment taxes. Attach Schedule H .............

10 Repayment of first-time homebuyer credit. Attach Form 5405 if required ..... 11 Additional Medicare Tax. Attach Form 8959 ................ 12 Net investment income tax. Attach Form 8960 ............... 13 Uncollected social security and Medicare or RRTA tax on tips or group-term life

insurance from Form W-2, box 12 .................... 14 Interest on tax due on installment income from the sale of certain residential lots and timeshares ............................ 15 Interest on the deferred tax on gain from certain installment sales with a sales price over $150,000 ............................

16 Recapture of low-income housing credit. Attach Form 8611 ..........

230,877.

*(continued on page 2)*

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule 2 (Form 1040) 2021

Schedule 2 (Form 1040) 2021 Page 2 Part II Other Taxes *(continued)*

17 Other additional taxes:

a Recapture of other credits. List type, form number, and amount a

b Recapture of federal mortgage subsidy. If you sold your home in 2021, see instructions .................

c Additional tax on HSA distributions. Attach Form 8889 .... d Additional tax on an HSA because you didn’t remain an eligible individual. Attach Form 8889 ..............

e Additional tax on Archer MSA distributions. Attach Form 8853 . f Additional tax on Medicare Advantage MSA distributions. Attach Form 8853 ..................... g Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property .......

| 17a |  | 18 |
| --- | --- | --- |
| 17b |  |
| 17c |  |
| 17d |  |
| 17e |  |
| 17f |  |
| 17g |  |
| 17h |  |
| 17i |  |
| 17j |  |
| 17k |  |
| 17l |  |
| 17m |  |
| 17n |  |
| 17o |  |
| 17p |  |
| 17q |  |
| 17z |  |
| .. | ..... |
| .. | ..... | 19 |
| 20  . | Enter here  ..... | 21 |

**COPY**

h Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A . . .

i Compensation you received from a nonqualified deferred compensation plan described in section 457A .......

j Section 72(m)(5) excess benefits tax ........... k Golden parachute payments .............. l Tax on accumulation distribution of trusts ......... m Excise tax on insider stock compensation from an expatriated

corporation .....................

n Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866 ....................

o Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR ....

p Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund ....

q Any interest from Form 8621, line 24 ........... z Any other taxes. List type and amount a

18 Total additional taxes. Add lines 17a through 17z .......19 Additional tax from Schedule 8812 .............20 Section 965 net tax liability installment from Form 965-A . . . 21 Add lines 4, 7 through 16, 18, and 19. These are your total other taxes. and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b .

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2,000.

232,877.

Schedule 2 (Form 1040) 2021

SCHEDULE 3

OMB No. 1545-0074

(Form 1040) 2021 Additional Credits and Payments

Department of the Treasury Internal Revenue Service

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

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

Attachment

Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR Your social security number DANIEL L JOHNSON 529-95-0491 Part I Nonrefundable Credits

| 1 |
| --- |
| 2 |
| 3 |
| 4 |
| 5 |
| 7 |
| 8 |

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

840.

2 Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441 .............................

3 Education credits from Form 8863, line 19 ................. 4 Retirement savings contributions credit. Attach Form 8880 .......... 5 Residential energy credits. Attach Form 5695 ............... 6 Other nonrefundable credits:

a General business credit. Attach Form 3800 ........ 6a

b Credit for prior year minimum tax. Attach Form 8801 ....

| 6b |  |
| --- | --- |
| 6c |  |
| 6d |  |
| 6e |  |
| 6f |  |
| 6g |  |
| 6h |  |
| 6i |  |
| 6j |  |
| 6k |  |
| 6l |  |
| 6z |  |

**~~C~~OPY**

c Adoption credit. Attach Form 8839 ............

d Credit for the elderly or disabled. Attach Schedule R .....

e Alternative motor vehicle credit. Attach Form 8910 .....

f Qualified plug-in motor vehicle credit. Attach Form 8936 . . .

g Mortgage interest credit. Attach Form 8396 ........

h District of Columbia first-time homebuyer credit. Attach Form 8859 i Qualified electric vehicle credit. Attach Form 8834 .....

j Alternative fuel vehicle refueling property credit. Attach Form 8911 k Credit to holders of tax credit bonds. Attach Form 8912 . . .

l Amount on Form 8978, line 14. See instructions ......

z Other nonrefundable credits. List type and amount a

7 Total other nonrefundable credits. Add lines 6a through 6z .......... 8 Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20 ...............................

840.

*(continued on page 2)*

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule 3 (Form 1040) 2021 **BAA** REV 09/09/22 PRO

Schedule 3 (Form 1040) 2021 Page 2 Part II Other Payments and Refundable Credits

| 9 |
| --- |
| 10 |
| 11 |
| 12 |
| 14 |
| 15 |

9 Net premium tax credit. Attach Form 8962 ................. 10 Amount paid with request for extension to file (see instructions) ........ 11 Excess social security and tier 1 RRTA tax withheld ............. 12 Credit for federal tax on fuels. Attach Form 4136 .............. 13 Other payments or refundable credits:

a Form 2439 ..................... 13a

1,450,000.

b Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken before April 1, 2021 ......

c Health coverage tax credit from Form 8885 ........ d Credit for repayment of amounts included in income from earlier years ........................

| 13b |  |
| --- | --- |
| 13c |  |
| 13d |  |

e Reserved for future use ................ 13e

| 13f |  |
| --- | --- |
| 13g |  |
| 13h |  |
| 13z |  |

**BAA** REV 09/09/22 PRO **C~~OP~~Y**

f Deferred amount of net 965 tax liability (see instructions) . . .

g Credit for child and dependent care expenses from Form 2441, line 10. Attach Form 2441 ...............

h Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken after March 31, 2021 .....

z Other payments or refundable credits. List type and amount a

14 Total other payments or refundable credits. Add lines 13a through 13z ..... 15 Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31 ...............................

1,450,000.

Schedule 3 (Form 1040) 2021

SCHEDULE A (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Itemized Deductions

a Go to *www.irs.gov/ScheduleA* for instructions and the latest information. a Attach to Form 1040 or 1040-SR.

Caution: If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

OMB No. 1545-0074 2021

Attachment

Sequence No. 07

Name(s) shown on Form 1040 or 1040-SR Your social security number DANIEL L JOHNSON 529-95-0491

Medical and

Dental

Expenses

Taxes You Paid

Caution: Do not include expenses reimbursed or paid by others. 1 Medical and dental expenses (see instructions) ....... 2 Enter amount from Form 1040 or 1040-SR, line 11 2 3 Multiply line 2 by 7.5% (0.075) ............. 4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- ...5 State and local taxes.

State and local income taxes or general sales taxes. You may include a

| 1 |  | 4 |
| --- | --- | --- |
| 3 |  |
| . | ..... |
| 5a  5b 5c 5d  5e  6  . | 2,280.  2,797.  5,077.  5,077.  ..... | 7 |
| 8a | 14,234. | 10 |
| 8b |  |
| 8c |  |
| 8d | 0. |
| 8e | 14,234. |
| 9 |  |
| . | ..... |
| 11 | 160. | 14 |
| 12 |  |
| 13 |  |
| . | ..... |
| . | ..... | 15 |
|  |  | 16 |
| . | ..... | 17 |
| . | .... a |  |

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 ................. a

Interest

You Paid

Caution: Your mortgage interest deduction may be limited (see

instructions).

b State and local real estate taxes (see instructions) ....... c State and local personal property taxes . . ........ d Add lines 5a through 5c . .............. e Enter the smaller of line 5d or $10,000 ($5,000 if married filing

**C~~O~~P~~Y~~**

separately) ................... 6 Other taxes. List type and amount a

7 Add lines 5e and 6 .................

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

a Home mortgage interest and points reported to you on Form 1098. See instructions if limited ..............

Home mortgage interest not reported to you on Form 1098. See b

5,077.

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 ................... a

Gifts to

Charity

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

Casualty and Theft Losses

Other

Itemized

Deductions

Total

Itemized

Deductions

c Points not reported to you on Form 1098. See instructions for special rules .....................

d Mortgage insurance premiums (see instructions) .......

e Add lines 8a through 8d ...............

9 Investment interest. Attach Form 4952 if required. See instructions .

10 Add lines 8e and 9 .................11 Gifts by cash or check. If you made any gift of $250 or more, see instructions ...................

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....

13 Carryover from prior year ..............

14 Add lines 11 through 13 ................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 ....................

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

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 .............

18 If you elect to itemize deductions even though they are less than your standard deduction, check this box ...................

14,234. 160.

19,471.

For Paperwork Reduction Act Notice, see the Instructions for Forms 1040 and 1040-SR. Schedule A (Form 1040) 2021 **BAA** REV 09/09/22 PRO

SCHEDULE B (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Interest and Ordinary Dividends

a Go to *www.irs.gov/ScheduleB* for instructions and the latest information. a Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074 2021

Attachment

Sequence No. 08

Name(s) shown on return Your social security number DANIEL L JOHNSON 529-95-0491

Part I

Interest

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

| 1 |
| --- |
| 2 |
| 3 |
| 4 |
|  |
| 5 |
| 6 |

Amount

(See instructions and the

Instructions for Form 1040, line 2b.)

Note: If you

received a Form 1099-INT, Form 1099-OID, or substitute

statement from a brokerage firm, list the firm’s name as the

payer and enter the total interest shown on that form.

GOLDMAN SACHS 43. CNL STRATEGIC CAPITAL LLC 907. BRIDGE OPPORTUNITY ZONE FUND IV LP 200. CYNOSURE PARTNERS 2020 PV LP 2,374. GRIFFIN CAPITAL QUALIFIED OPPORTUNITY 4. TORKABC, LLC 439.

**~~COP~~~~Y~~**

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

3,967. 3,967.

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

Part II

5 List name of payer a

FIDELITY 34,337.

Ordinary Dividends

(See instructions and the

Instructions for Form 1040, line 3b.)

Note: If you

received a Form 1099-DIV or

substitute

statement from a brokerage firm, list the firm’s name as the

payer and enter the ordinary

dividends shown

FIDELITY 16,880. CNL STRATEGIC CAPITAL LLC 316. GRIFFIN CAPITAL QUALIFIED OPPORTUNITY 22.

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

on that form. Part III

line 3b ........................ a Note: If line 6 is over $1,500, you must complete Part III.

You must complete this part if you (a) had over $1,500 of taxable interest or ordinary dividends; (b) had a

51,555.

| Yes No |
| --- |
|  |
|  |
|  |

Foreign Accounts and Trusts

Caution: If

required, failure to file FinCEN Form 114 may result in

substantial

penalties. See instructions.

foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

7 a At any time during 2021, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions ........................

If “Yes,” are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements ......

b If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located a

8 During 2021, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If “Yes,” you may have to file Form 3520. See instructions .........

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule B (Form 1040) 2021 **BAA** REV 09/09/22 PRO

SCHEDULE D (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Capital Gains and Losses

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

a Go to *www.irs.gov/ScheduleD* for instructions and the latest information. a Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074 2021

Attachment

Sequence No. 12

Name(s) shown on return Your social security number DANIEL L JOHNSON 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) |  |
| --- | --- | --- | --- |
| 194,547. | 194,121. |  |  |
| 92,399. | 91,529. **Y** |  | 233. |
|  |  |  | |
| **P** |  |  | |
|  |  | . . | 4 |
| . . . . . . | . . . . . . | . . . . | 5 |
| . . . . . . | Capital Loss Carryover . . . . . . | . . . . | 6 |
| Combine lines 1a through 6 in column (h). If you have any long | .. | .... | 7 |

(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 .

426.

1b Totals for all transactions reported on Form(s) 8949 with

Box A checked .............

2 Totals for all transactions reported on Form(s) 8949 with

Box B checked .............

3 Totals for all transactions reported on Form(s) 8949 with

Box C checked .............

4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . . . . . . . . . .

**~~C~~~~O~~**

6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your

1,103. 3,593.

Worksheet in the instructions . . . . . . . .( ) 7 Net short-term capital gain or (loss).

term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back

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) |  |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
| 7,125,000. | 0. |  | |
|  |  | -1,000,000. | |
| ...... | ...... | .... | 11 |
|  |  |  | 12 |
| ...... | ...... | .... | 13 |
| ...... | Capital Loss Carryover ...... | .... | 14 |
| Combine lines 8a through 14 in column (h). Then, go to Part III ...... | ...... | .... | 15 |

(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 .............

10 Totals for all transactions reported on Form(s) 8949 with

Box F checked..............

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 .......

12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 13 Capital gain distributions. See the instructions ...

14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your

7,125,000. -1,000,000.

76,059.

Worksheet in the instructions ........( ) 15 Net long-term capital gain or (loss).

on the back ...............

6,201,059.

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule D (Form 1040) 2021 **BAA** REV 09/09/22 PRO

Schedule D (Form 1040) 2021 Page 2 Part III Summary

| 16 |
| --- |
| 18 |
| 19 |
| 21 |

16 Combine lines 7 and 15 and enter the result ..................

• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.

• If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.

• If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.

17 Are lines 15 and 16 both gains?

Yes. Go to line 18.

No. Skip lines 18 through 21, and go to line 22.

18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet ................. a

**COPY**

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 ......... a

20 Are lines 18 and 19 both zero or blank and are you not filing Form 4952?

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.

No. Complete the Schedule D Tax Worksheet in the instructions. Don’t complete lines 21 and 22 below.

21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: • The loss on line 16; or

6,206,181.

• ($3,000), or if married filing separately, ($1,500) } ............... ( ) 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?

Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions

for Forms 1040 and 1040-SR, line 16.

No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.

REV 09/09/22 PRO

Schedule D (Form 1040) 2021

Form 8949

Department of the Treasury Internal Revenue Service

Sales and Other Dispositions of Capital Assets

a Go to *www.irs.gov/Form8949* for instructions and the latest information. a File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

OMB No. 1545-0074 2021

Attachment

Sequence No. 12A

Name(s) shown on return Social security number or taxpayer identification number DANIEL L JOHNSON 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) | **PY**  (e)  Cost or other basis. See the Note below and see *Column (e)* 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. | |
| --- | --- | --- | --- | --- | --- |
| **(f)**  Code(s) from instructions | (g)  Amount of  adjustment |
| 08/11/21 | 12/31/21 | 92,399. | 91,529. | W | 233. |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  | **O** |  |  |  |
|  | **C** |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Add the amounts in columns (d), (e), (g), and (h) (subtract  above is checked), above is checked) | line 2 (if Box B a | 92,399. | 91,529. |  | 233. |

(h)

Gain or (loss).

Subtract column (e) from column (d) and combine the result with column (g)

FIDELITY 1,103.

2 Totals.

negative amounts). Enter each total here and include on your

Schedule D, line 1b (if Box A above is checked), or line 3 (if Box C

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. For Paperwork Reduction Act Notice, see your tax return instructions. Form 8949 (2021) **BAA** REV 09/09/22 PRO

Form 8949 (2021) Attachment Sequence No. 12A Page 2

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 **Y**  and see *Column (e)* 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. | |
| --- | --- | --- | --- | --- | --- |
| **(f)**  Code(s) from instructions | (g)  Amount of  adjustment |
| Various | 07/31/21 | 7,125,000. | 0. |  |  |
|  |  |  | **P** |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  | **O** |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  | **C** |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Add the amounts in columns (d), (e), (g), and (h) (subtract  above is checked), above is checked) | line 9 (if Box E a | 7,125,000. | 0. |  |  |

(h)

Gain or (loss).

Subtract column (e) from column (d) and combine the result with column (g)

ZONOS 7,125,000.

2 Totals.

negative amounts). Enter each total here and include on your

Schedule D, line 8b (if Box D

above is checked), or line 10 (if Box F

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.

**BAA** REV 09/09/22 PRO

Form 8949 (2021)

Form 8949 (2021) Attachment Sequence No. 12A Page 2

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 **Y**  and see *Column (e)* 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. | |
| --- | --- | --- | --- | --- | --- |
| **(f)**  Code(s) from instructions | (g)  Amount of  adjustment |
| 12/10/21 |  |  |  | Z | -350,000. |
| 12/31/21 |  |  | **P** | Z | -300,000. |
| 12/31/21 |  |  |  | Z | -350,000. |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  | **O** |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  | **C** |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Add the amounts in columns (d), (e), (g), and (h) (subtract  above is checked), above is checked) | line 9 (if Box E a |  |  |  | -1,000,000. |

(h)

Gain or (loss).

Subtract column (e) from column (d) and combine the result with column (g)

83-3873722 -350,000. 85-4323971 -300,000. 85-3274399 -350,000.

2 Totals.

negative amounts). Enter each total here and include on your

Schedule D, line 8b (if Box D

above is checked), or line 10 (if Box F

-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.

**BAA** REV 09/09/22 PRO

Form 8949 (2021)

Schedule E (Form 1040) 2021 Attachment Sequence No. 13 Page 2

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

| (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 |
| --- | --- | --- | --- | --- |
| CNL STRATEGIC CAPITAL LLC | P | | 32-0503849 |  |
| BRIDGE OPPORTUNITY ZONE FUND IV LP | P | | 85-4323971 |  |
| CYNOSURE PARTNERS 2020 PV LP | P | | 85-4331489 |  |
| See line 28 information |  | |  |  |

28 (f) Check if

any amount is

not at risk

A

B

C

D

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 |
| --- | --- | --- | --- |
|  |  |  |  |
| 185. |  |  |  |
|  | 191. |  |  |
| 6. |  | **Y**24,807. |  |
| Totals | 191. |  |  |

(k) Nonpassive income

from Schedule K-1 0.

A

B

C

D

29a

b Totals

**~~O~~~~P~~**

0.

191. 24,807.

30 Add columns (h) and (k) of line 29a.....................

| 30 |
| --- |
| 31 |
| 32 |

191.

24,998.

31 Add columns (g), (i), and (j) of line 29b.................... ( )

32 Total partnership and S corporation income or (loss). Combine lines 30 and 31 .... Part III Income or Loss From Estates and Trusts

-24,807.

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) | **C**  (d) Passive income  from Schedule K-1 | (e) Deduction or loss  from Schedule K-1 |
| --- | --- | --- |
|  |  |  |
|  |  |  |
| Totals |  |  |

(f) Other income from

Schedule K-1 A

B

34a

b Totals

35 Add columns (d) and (f) of line 34a ....................

| 35 |
| --- |
| 36 |
| 37 |

36 Add columns (c) and (e) of line 34b .................... ( ) 37 Total estate and trust income or (loss). Combine lines 35 and 36 .......... Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs)—Residual Holder

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

38 (a) Name (e) Income from Schedules Q, line 3b

39

Part V Summary

40 Net farm rental income or (loss) from Form 4835. Also, complete line 42 below ...... 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 a

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

| 40 |
| --- |
| 41 |

-24,807.

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 . . . . . .

REV 09/09/22 PRO

| 43 |  |
| --- | --- |

Schedule E (Form 1040) 2021

Form 1116 Department of the Treasury

Foreign Tax Credit

(Individual, Estate, or Trust)

a Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.

COPY 1

OMB No. 1545-0121 2021

Attachment

Internal Revenue Service (99)

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

Sequence No. 19

Name Identifying number as shown on page 1 of your tax return DANIEL L JOHNSON 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.

a Section 951A category income b Foreign branch category income

h Resident of (name of country) a

c Passive category income d General category income

USA

e Section 901(j) income

f Certain income re-sourced by treaty

g Lump-sum distributions

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 | | |  |
| --- | --- | --- | --- |
| A | B | C |  |
| Various |  |  | 1a |
| 6,200. |  |  |
|  | **PY** |  |  |
|  |  |  | 6 |
| **O**5,077. |  |  |
| 7,200. |  |  |
| 12,277. |  |  |
| 6,200. |  |  |
| 7,307,901. |  |  |
| 0.0008 |  |  |
| 10. |  |  |
| 11. |  |  |
|  |  |  |
|  |  |  |
| 21. |  |  |
|  | . . . . . . | . . . . a | 7 |

Total

(Add cols. A, B, and C.) i Enter the name of the foreign country or U.S. possession . . . . . . . . . . . a

1a Gross income from sources within country shown

above and of the type checked above (see

instructions):

From 1099s

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 . . a

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) ...........

**C**

b Other deductions (attach statement) .....

c Add lines 3a and 3b ..........

d Gross foreign source income (see instructions) .

e Gross income from all sources (see instructions) .

f Divide line 3d by line 3e (see instructions) . . .

g Multiply line 3c by line 3f ........

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 .......

7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2

Part II Foreign Taxes Paid or Accrued (see instructions)

| Credit is claimed  for taxes  (you must check one) (j) Paid  (k) 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 | |
| (l) Date paid  or accrued | (m) Dividends | (n) Rents  and royalties | (o) Interest | (q) Dividends | (r) Rents  and royalties | (s) Interest |
| 12/31/2021 |  |  |  |  | 840. |  |  |  | |
|  |  |  |  |  |  |  |  |  | |
|  |  |  |  |  |  |  |  |  | |
| Add lines A through C, column (u). Enter the total here and on line 9, page 2 |  |  |  |  |  | . . . . | . . . | . a | 8 |

21.

6,179.

Country (u) Total foreign

taxes paid or

accrued (add cols.

(q) through (t))

A B C 8

840. 840.

For Paperwork Reduction Act Notice, see instructions. Form 1116 (2021) **BAA** REV 09/09/22 PRO

Form 1116 (2021) Page 2 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 . .

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.)

11 Add lines 9 and 10 ............... 12 Reduction in foreign taxes (see instructions) . . . . . . . 13 Taxes reclassified under high tax kickout (see instructions) . .

| 9 | 840. | 14 |
| --- | --- | --- |
| 10 |  |
| 11 | 840. |
| 12 | ( ) |
| 13 |  |
|  | . . |
| 15  16  17  18  .. | 6,179.  **PY**  6,179.  6,255,971.  ....... | 19 |
| .. | ....... | 20 |
| .. | (lump-sum distributions), or, if you file ....... | 21 |
| .. | ....... | 22 |
| .. | ....... | 23 |
| . . | . . . . . . . a | 24 |

14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit .

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 ......

16 Adjustments to line 15 (see instructions) ........

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.) .......

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 . . . . .

Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see

840.

instructions.

**CO**

19 Divide line 17 by line 18. If line 17 is more than line 18, enter “1” ..

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 .............

Caution: If you are completing line 20 for separate category g

Form 8978, Partner's Additional Reporting Year Tax, see instructions.

21 Multiply line 20 by line 19 (maximum amount of credit) .....

22 Increase in limitation (section 960(c)) ..........

23 Add lines 21 and 22 ................

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 . . . . . . . . . . . . . . . . . .

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

0.0010

1,224,433. 1,224.

1,224.

840.

25 Credit for taxes on section 951A category income . .... 26 Credit for taxes on foreign branch category income . .... 27 Credit for taxes on passive category income ....... 28 Credit for taxes on general category income ....... 29 Credit for taxes on section 901(j) income ........ 30 Credit for taxes on certain income re-sourced by treaty .... 31 Credit for taxes on lump-sum distributions ........ 32 Add lines 25 through 31 ..............

33 Enter the smaller of line 20 or line 32 ..........

| 25 |  | 32 |
| --- | --- | --- |
| 26 |  |
| 27 |  |
| 28 |  |
| 29 |  |
| 30 |  |
| 31 |  |
| .. | ....... |
| .. | ....... | 33 |
|  | .... | 34 |
|  | Enter here and on Schedule 3 (Form . . . . . . a | 35 |

840.

34 Reduction of credit for international boycott operations. See instructions for line 12 .

35 Subtract line 34 from line 33. This is your foreign tax credit.

1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a .

REV 09/09/22 PRO

840.

Form 1116 (2021)

Form 1116 Department of the Treasury

Alt Min Tax - Passive

Foreign Tax Credit

(Individual, Estate, or Trust)

a Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.

COPY 1

OMB No. 1545-0121 2021

Attachment

Internal Revenue Service (99)

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

Sequence No. 19

Name Identifying number as shown on page 1 of your tax return DANIEL L JOHNSON 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.

a Section 951A category income b Foreign branch category income

h Resident of (name of country) a

c Passive category income d General category income

USA

e Section 901(j) income

f Certain income re-sourced by treaty

g Lump-sum distributions

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 | | |  |
| --- | --- | --- | --- |
| A | B | C |  |
| Various |  |  | 1a |
| 6,200. |  |  |
|  | **PY** |  |  |
|  |  |  | 6 |
| **O** |  |  |
| 7,200. |  |  |
| 7,200. |  |  |
| 6,200. |  |  |
| 7,307,901. |  |  |
| 0.0008 |  |  |
| 6. |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| 6. |  |  |
|  | . . . . . . | . . . . a | 7 |

Total

(Add cols. A, B, and C.) i Enter the name of the foreign country or U.S. possession . . . . . . . . . . . a

1a Gross income from sources within country shown

above and of the type checked above (see

instructions):

From 1099s

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 . . a

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) ...........

**C**

b Other deductions (attach statement) .....

c Add lines 3a and 3b ..........

d Gross foreign source income (see instructions) .

e Gross income from all sources (see instructions) .

f Divide line 3d by line 3e (see instructions) . . .

g Multiply line 3c by line 3f ........

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 .......

7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2

Part II Foreign Taxes Paid or Accrued (see instructions)

| Credit is claimed  for taxes  (you must check one) (j) Paid  (k) 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 | |
| (l) Date paid  or accrued | (m) Dividends | (n) Rents  and royalties | (o) Interest | (q) Dividends | (r) Rents  and royalties | (s) Interest |
| 12/31/2021 |  |  |  |  | 840. |  |  |  | |
|  |  |  |  |  |  |  |  |  | |
|  |  |  |  |  |  |  |  |  | |
| Add lines A through C, column (u). Enter the total here and on line 9, page 2 |  |  |  |  |  | . . . . | . . . | . a | 8 |

6.

6,194.

Country (u) Total foreign

taxes paid or

accrued (add cols.

(q) through (t))

A B C 8

840. 840.

For Paperwork Reduction Act Notice, see instructions. Form 1116 (2021) **BAA** REV 09/09/22 PRO

Form 1116 (2021) Page 2

Alt Min Tax - Passive

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 . .

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.)

11 Add lines 9 and 10 ............... 12 Reduction in foreign taxes (see instructions) . . . . . . . 13 Taxes reclassified under high tax kickout (see instructions) . .

| 9 | 840. | 14 |
| --- | --- | --- |
| 10 |  |
| 11 | 840. |
| 12 | ( ) |
| 13 |  |
|  | . . |
| 15  16  17  18  .. | 6,194.  **PY**  6,194.  6,261,048.  ....... | 19 |
| .. | ....... | 20 |
| .. | (lump-sum distributions), or, if you file ....... | 21 |
| .. | ....... | 22 |
| .. | ....... | 23 |
| . . | . . . . . . . a | 24 |

14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit .

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 ......

16 Adjustments to line 15 (see instructions) ........

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.) .......

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 . . . . .

Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see

840.

instructions.

**CO**

19 Divide line 17 by line 18. If line 17 is more than line 18, enter “1” ..

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 .............

Caution: If you are completing line 20 for separate category g

Form 8978, Partner's Additional Reporting Year Tax, see instructions.

21 Multiply line 20 by line 19 (maximum amount of credit) .....

22 Increase in limitation (section 960(c)) ..........

23 Add lines 21 and 22 ................

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 . . . . . . . . . . . . . . . . . .

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

0.0010

1,232,252. 1,232.

1,232.

840.

25 Credit for taxes on section 951A category income . .... 26 Credit for taxes on foreign branch category income . .... 27 Credit for taxes on passive category income ....... 28 Credit for taxes on general category income ....... 29 Credit for taxes on section 901(j) income ........ 30 Credit for taxes on certain income re-sourced by treaty .... 31 Credit for taxes on lump-sum distributions ........ 32 Add lines 25 through 31 ..............

33 Enter the smaller of line 20 or line 32 ..........

| 25 |  | 32 |
| --- | --- | --- |
| 26 |  |
| 27 |  |
| 28 |  |
| 29 |  |
| 30 |  |
| 31 |  |
| .. | ....... |
| .. | ....... | 33 |
|  | .... | 34 |
|  | Enter here and on Schedule 3 (Form . . . . . . a | 35 |

840.

34 Reduction of credit for international boycott operations. See instructions for line 12 .

35 Subtract line 34 from line 33. This is your foreign tax credit.

1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a .

REV 09/09/22 PRO

840.

Form 1116 (2021)

Form 6251 2021

Department of the Treasury Internal Revenue Service (99)

Alternative Minimum Tax—Individuals

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

OMB No. 1545-0074

Attachment

Sequence No. 32

Name(s) shown on Form 1040, 1040-SR, or 1040-NR Your social security number DANIEL L JOHNSON 529-95-0491 Part I Alternative Minimum Taxable Income (See instructions for how to complete each line.)

| 1 |
| --- |
| 2a |
| 2b |
| 2c |
| 2d |
| 2e |
| 2f |
| 2g |
| 2h |
| 2i |
| 2j |
| 2k |
| 2l |
| 2m |
| 2n |
| 2o |
| 2p |
| 2q |
| 2r |
| 2s |
| 2t |
| 3 |
| 4 |

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.) . .................

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 ........................

6,255,971. 5,077.

b Tax refund from Schedule 1 (Form 1040), line 1 or line 8z ................ ( ) c Investment interest expense (difference between regular tax and AMT) ............ d Depletion (difference between regular tax and AMT) . ................. e Net operating loss deduction from Schedule 1 (Form 1040), line 8a. Enter as a positive amount . . . . f Alternative tax net operating loss deduction .................... ( ) g Interest from specified private activity bonds exempt from the regular tax ...........

0.

h Qualified small business stock, see instructions ................... i Exercise of incentive stock options (excess of AMT income over regular tax income) ........ **C~~O~~PY**

j Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A) .......... 0.

k Disposition of property (difference between AMT and regular tax gain or loss) .......... l Depreciation on assets placed in service after 1986 (difference between regular tax and AMT) ..... 0.

m Passive activities (difference between AMT and regular tax income or loss) . ......... n Loss limitations (difference between AMT and regular tax income or loss) ........... o Circulation costs (difference between regular tax and AMT)................ p Long-term contracts (difference between AMT and regular tax income) ............ q Mining costs (difference between regular tax and AMT) ................. r Research and experimental costs (difference between regular tax and AMT) ..........

s Income from certain installment sales before January 1, 1987 . . . . . . . . . . . . . . . ( ) t Intangible drilling costs preference . . . . . . . . . . . . . . . . . . . . . . . 3 Other adjustments, including income-based related adjustments .............. 4 Alternative minimum taxable income. Combine lines 1 through 3. (If married filing separately and line 4 is

more than $752,800, see instructions.) ...................... Part II Alternative Minimum Tax (AMT)

| 5 |
| --- |
| 6 |
| 7 |
| 8 |
| 9 |
| 10 |
| 11 |

5 Exemption.

IF your filing status is . . . AND line 4 is not over . . . THEN enter on line 5 . . .

6,261,048.

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 If line 4 is over the amount shown above for your filing status, see instructions.

} ..

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 ............................ 7 • If you are filing Form 2555, see instructions for the amount to enter.

6,261,048.

• 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.

} . .

1,232,252.

8 Alternative minimum tax foreign tax credit (see instructions) . . . . . . . . . . . . . . . 9 Tentative minimum tax. Subtract line 8 from line 7 . .................

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 ..............................

11 AMT. Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1

840.

1,231,412.

1,223,593. 7,819.

For Paperwork Reduction Act Notice, see your tax return instructions. Form 6251 (2021) **BAA** REV 09/09/22 PRO

Form 6251 (2021) Page 2 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 |
| --- |
| 13 |
| 14 |
| 15 |
| 16 |
| 17 |
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| 22 |
| 23 |
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| 38 |
| 39 |
| 40 |

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 ......................

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 ..................

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 . . .......

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 .......................

16 Enter the smaller of line 12 or line 15 ...................... 17 Subtract line 16 from line 12 ......................... 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 . . . a

6,261,048. 6,211,587.

6,211,587. 6,211,587. 49,461.

12,860.

19 Enter:

**COPY**

• $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.

} . .

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 .......

21 Subtract line 20 from line 19. If zero or less, enter -0- ................. 22 Enter the smaller of line 12 or line 13 ...................... 23 Enter the smaller of line 21 or line 22. This amount is taxed at 0% ............. 24 Subtract line 23 from line 22 ......................... 25 Enter:

44,384.

9,716.

6,211,587. 9,716.

6,201,871.

• $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.

} . .

473,750.

26 Enter the amount from line 21 .........................

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 .......

28 Add line 26 and line 27 ........................... 29 Subtract line 28 from line 25. If zero or less, enter -0- ................. 30 Enter the smaller of line 24 or line 29 ...................... 31 Multiply line 30 by 15% (0.15) . . . . . . . . . . . . . . . . . . . . . . . . a 32 Add lines 23 and 30 ............................

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 ......................... 34 Multiply line 33 by 20% (0.20) . . . . . . . . . . . . . . . . . . . . . . . a

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 .......................... 36 Subtract line 35 from line 12 ........................ 37 Multiply line 36 by 25% (0.25) ....................... a 38 Add lines 18, 31, 34, and 37 ......................... 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 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 ......

REV 09/09/22 PRO

9,716.

44,384.

54,100.

419,650.

419,650.

62,948.

429,366.

5,782,221. 1,156,444.

1,232,252. 1,749,095.

1,232,252. Form 6251 (2021)

SCHEDULE 8812

Credits for Qualifying Children

1040

`

OMB No. 1545-0074

(Form 1040) 2021

Department of the Treasury

and Other Dependents a Attach to Form 1040, 1040-SR, or 1040-NR.

. . . . . . . . . 1040-SR

. . . . . . . . . 1040-NR

8812

Attachment

Internal Revenue Service (99)

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

Sequence No. 47

Name(s) shown on return Your social security number DANIEL L JOHNSON 529-95-0491 Part I-A Child Tax Credit and Credit for Other Dependents

| **1** |
| --- |
| **2d** |
| **3** |
| **5** |
| **7** |
| **8** |
| **9** |
| **10** |
| **11** |
| **12** |

**1** Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR ............ **2a** Enter income from Puerto Rico that you excluded ........... **2a**

6,275,703.

**b** Enter the amounts from lines 45 and 50 of your Form 2555 ........ **c** Enter the amount from line 15 of your Form 4563 ...........

| **2b** | 0. |
| --- | --- |
| **2c** |  |

**d** Add lines 2a through 2c ........................... **3** Add lines 1 and 2d ............................

0.

6,275,703.

2.

**4a** Number of qualifying children under age 18 with the required social security number **4a**

**b** Number of children included on line 4a who were under age 6 at the end of 2021 . . **c** Subtract line 4b from line 4a .................

| **4b** | 0. |
| --- | --- |
| **4c** | 2. |

**5** If line 4a is more than zero, enter the amount from the **Line 5 Worksheet**; otherwise, enter -0- ...... **6** Number of other dependents, including any qualifying children who are not under age

4,000.

0.

18 or who do not have the required social security number ........ **6 ~~C~~OPY**

**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 ........................... **8** Add lines 5 and 7 ............................. **9** Enter the amount shown below for your filing status.

• All other filing statuses—$200,000 } ......................

• Married filing jointly—$400,000

**10** Subtract line 9 from line 3.

• If zero or less, enter -0-.

example, if the result is $425, enter $1,000; if the result is $1,025, enter $2,000, etc. } .......

• If more than zero and not a multiple of $1,000, enter the next multiple of $1,000. For

**11** Multiply line 10 by 5% (0.05) ......................... **12** Subtract line 11 from line 8. If zero or less, enter -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 ........................ **B** Check here if you (or your spouse if married filing jointly) were a bona fide resident of Puerto Rico for 2021 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** |
| --- |
| **14b** |
| **14c** |
| **14d** |
| **14e** |
| **14f** |
| **14g** |
| **14h** |
| **14i** |

**14a** Enter the smaller of line 7 or line 12 ....................... **b** Subtract line 14a from line 12 ......................... **c** If line 14a is zero, enter -0-; otherwise, enter the amount from the **Credit Limit Worksheet A** ...... **d** Enter the smaller of line 14a or line 14c ...................... **e** Add lines 14b and 14d ...........................

4,000.

200,000.

6,076,000. 303,800. 0.

0.

0.

0.

0.

0.

Enter the aggregate amount of advance child tax credit payments you (and your spouse if filing jointly) received

**f**

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- ............................ **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.

2,000.

0.

**g** Subtract line 14f from line 14e. If zero or less, enter -0- on lines 14g through 14i and go to Part III ....

**h** Enter the smaller of line 14d or line 14g. **This is your credit for other dependents. Enter this amount on line** 0.

**19 of your Form 1040, 1040-SR, or 1040-NR** ....................

**i** Subtract line 14h from line 14g. **This is your refundable child tax credit. Enter this amount on line 28 of** 0.

**your Form 1040, 1040-SR, or 1040-NR** ......................

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule 8812 (Form 1040) 2021 **BAA** REV 09/09/22 PRO

Schedule 8812 (Form 1040) 2021 Page 2 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** |
| --- |
| **15b** |
| **15c** |
| **15d** |
| **15e** |
| **15f** |
| **15g** |
| **15h** |

**15a** Enter the amount from the **Credit Limit Worksheet A** ................. **b** Enter the smaller of line 12 or line 15a ...................... 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- ...... **d** Add lines 15b and 15c ...........................

Enter the aggregate amount of advance child tax credit payments you (and your spouse if filing jointly) received

**e**

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- ............................ **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 .... **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** ........ **COP~~Y~~**

**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** ....................... 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** |
| --- |
| **16b** |
| **17** |
| **20** |

**16a** Subtract line 15b from line 12. If zero, skip Parts II-A and II-B and enter -0- on line 27 ........ **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 ............ **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 ...................... **18a** Earned income (see instructions) ................ **18a**

**b** Nontaxable combat pay (see instructions) ...... **18b 19** Is the amount on line 18a more than $2,500?

**No.** Leave line 19 blank and enter -0- on line 20.

**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 .............. **Next.** On line 16b, is the amount $4,200 or more?

**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.

**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 ......................

**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 . **23** Add lines 21 and 22 .................... **24 1040 and**

**1040-SR filers:** Enter the total of the amounts from Form 1040 or 1040-SR, line 27a, **1040-NR filers:** Enter the amount from Schedule 3 (Form 1040), line 11. }

and Schedule 3 (Form 1040), line 11.

**25** Subtract line 24 from line 23. If zero or less, enter -0- ...........**26** Enter the **larger** of line 20 or line 25 ................**Next,** enter the **smaller** of line 17 or line 26 on line 27.

Part II-C Additional Child Tax Credit

| **21** |  | **25** |
| --- | --- | --- |
| **22** |  |
| **23** |  |
| **24** |  |
| .. | ..... |
| .. | ..... | **26** |

| **27** |
| --- |

**27** Enter this amount on line 15c .........................

**BAA** REV 09/09/22 PRO Schedule 8812 (Form 1040) 2021

Schedule 8812 (Form 1040) 2021 Page 3 Part III Additional Tax (use only if line 14g or line 15f, whichever applies, is zero)

| **28a** |
| --- |
| **28b** |
| **29** |
| **30** |
| **31** |
| **32** |
| **33** |
| **34** |
| **35** |
| **36** |
| **37** |
| **38** |
| **39** |
| **40** |

**28a** Enter the amount from line 14f or line 15e, whichever applies ............... **b** Enter the amount from line 14e or line 15d, whichever applies ............... **29** Excess advance child tax credit payments. Subtract line 28b from line 28a. If zero, stop; you do not owe the additional tax .............................. **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.

**31** Enter the smaller of line 4a or line 30 ....................... **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 ................................ **33** Enter the amount shown below for your filing status.

• Married filing jointly or Qualifying widow(er)—$60,000

• All other filing statuses—$40,000 } ...............

• Head of household—$50,000

**34** Subtract line 33 from line 3. If zero or less, enter -0- .................. **35** Enter the amount from line 33 ......................... **CO~~P~~Y**

**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 ............................. **37** Multiply line 32 by $2,000 .......................... **38** Multiply line 37 by line 36 .......................... **39** Subtract line 38 from line 37 ......................... **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** ...................

2,000.

0.

2,000.

4.

2.

2.

50,000.

6,225,703. 50,000.

1.

4,000.

4,000.

0.

2,000.

**BAA** REV 09/09/22 PRO

Schedule 8812 (Form 1040) 2021

Form 8889 2021 Health Savings Accounts (HSAs) OMB No. 1545-0074

Department of the Treasury Internal Revenue Service

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

a Go to *www.irs.gov/Form8889* for instructions and the latest information.

Attachment

Sequence No. 52

Name(s) shown on Form 1040, 1040-SR, or 1040-NR Social security number of HSA beneficiary. If both spouses

DANIEL L JOHNSON 529-95-0491 have HSAs, see instructions a

*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 ............................ a Self-only 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 |
| --- |
| 4 |
| 5 |
| 6 |
| 7 |
| 8 |
| 11 |
| 12 |
| 13 |
|  |

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 ..........

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 **C~~O~~PY**

include any amount contributed to your spouse’s Archer MSAs ............. 5 Subtract line 4 from line 3. If zero or less, enter -0- ................. 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 . . 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 8 Add lines 6 and 7 ............................ 9 Employer contributions made to your HSAs for 2021 ........ 9

7,200.

0.

7,200. 7,200.

0.

7,200.

10 Qualified HSA funding distributions ..............

| 10 |  |
| --- | --- |

11 Add lines 9 and 10 ............................ 12 Subtract line 11 from line 8. If zero or less, enter -0- ................. 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.

7,200. 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 |
| --- |
| 14b |
| 14c |
| 15 |
| 16 |
| 17b |

14 a Total distributions you received in 2021 from all HSAs (see instructions) .......... 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 .............. c Subtract line 14b from line 14a ........................ 15 Qualified medical expenses paid using HSA distributions (see instructions) ......... 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 .............. 17 a If any of the distributions included on line 16 meet any of the Exceptions to the Additional 20% Tax (see instructions), check here .................. a 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 ..........................

5,546.

5,546. 5,546.

0.

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 |
| --- |
| 19 |
| 20 |
| 21 |

18 Last-month rule ............................. 19 Qualified HSA funding distribution ....................... 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 ................. 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 . . . . . . . . . . . . . . . . . . . . . . . . . . .

For Paperwork Reduction Act Notice, see your tax return instructions. Form 8889 (2021) **BAA** REV 09/09/22 PRO

Form 8995-A

Department of the Treasury Internal Revenue Service

Qualified Business Income Deduction

1

a Attach to your tax return.

a Go to *www.irs.gov/Form8995A* for instructions and the latest information.

OMB No. 1545-2294 2021

Attachment

Sequence No. 55A

Name(s) shown on return Your taxpayer identification number DANIEL L JOHNSON 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.*

| (a) Trade, business, or aggregation name | (b) Check if  specified service | (c) Check if  aggregation | (d) Taxpayer  identification number |
| --- | --- | --- | --- |
|  | | |  |
|  | | |  |
|  | | |  |

1 (e) Check if  patron

A

B

C

Part II Determine Your Adjusted Qualified Business Income

C

2 Qualified business income from the trade, business, or aggregation.

See instructions . . . ..............

|  | A **Y** | B |
| --- | --- | --- |
| 2 |  |  |
| 3 | **P** |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 10 |  |  |
| 11 |  |  |
| 12 |  |  |
| 13 |  |  |
| 14 |  |  |
| 15 |  |  |
| 16 |  |  |

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 **CO**

filing jointly), skip lines 4 through 12 and enter the amount from line 3 on line 13 .................

4 Allocable share of W-2 wages from the trade, business, or

aggregation ..................

5 Multiply line 4 by 50% (0.50) ............

6 Multiply line 4 by 25% (0.25) ............

7 Allocable share of the unadjusted basis immediately after

acquisition (UBIA) of all qualified property ........

8 Multiply line 7 by 2.5% (0.025) ............

9 Add lines 6 and 8 ................

10 Enter the greater of line 5 or line 9 ...........

11 W-2 wage and UBIA of qualified property limitation. Enter the

smaller of line 3 or line 10 .............

12 Phased-in reduction. Enter the amount from line 26, if any . . .

13 Qualified business income deduction before patron reduction.

Enter the greater of line 11 or line 12 ..........

14 Patron reduction. Enter the amount from Schedule D (Form 8995-A),

line 6, if any. See instructions . . ..........

15 Qualified business income component. Subtract line 14 from line 13

16 Total qualified business income component. Add all amounts

reported on line 15 . . . . . . . . . . . . . . . a

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Form 8995-A (2021) REV 09/09/22 PRO

Form 8995-A (2021) Page 2 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.*

C

17 Enter the amounts from line 3 .....

18 Enter the amounts from line 10 .....

19 Subtract line 18 from line 17 .....

20 Taxable income before qualified business

income deduction ........

|  |  |  | A | B |
| --- | --- | --- | --- | --- |
| .. | ..... | 17 |  |  |
| .. | ..... | 18 |  |  |
| .. | ..... | 19 |  |  |
| 20 |  |  |  |  |
| 21 |  |  |  |  |
| 22 |  |  |  |  |
| 23 |  |  |  |  |
| 24 | % |  |  |  |
|  | .... | 25 |  |  |
| .. | ..... | 26 |  |  |

21

Threshold. Enter $164,900 ($164,925 if married filing separately; $329,800 if married filing jointly) ..........

22 Subtract line 21 from line 20 .... 23 Phase-in range. Enter $50,000 ($100,000 if married filing jointly) .......

24 Phase-in percentage. Divide line 22 by line 23 25 Total phase-in reduction. Multiply line 19 by line 24 .

26

Qualified business income after phase-in reduction. Subtract line

261. **COP~~Y~~**

25 from line 17. Enter this amount here and on line 12, for the

corresponding trade or business ....

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 ...... 28 Qualified REIT dividends and publicly traded partnership (PTP) income or (loss). See instructions .................. 29 Qualified REIT dividends and PTP (loss) carryforward from prior years . . . 30 Total qualified REIT dividends and PTP income. Combine lines 28 and 29. If less than zero, enter -0- .................. 31 REIT and PTP component. Multiply line 30 by 20% (0.20) .......

| 27 |  | 32 |
| --- | --- | --- |
| 28 | 1,305. |
| 29 | ( ) |
| 30 | 1,305. |
| 31 | 261. |
|  | . . . a |
| 33  34  .. | 6,256,232. 6,211,587...... | 35 |
| . . | . . . . . | 36 |
| . . | . . . . a | 37 |
| .. | ..... | 38 |
| . . | . . . . a | 39 |
| .. | ..... | 40 |

32 Qualified business income deduction before the income limitation. Add lines 27 and 31 .33 Taxable income before qualified business income deduction ...... 34 Net capital gain. See instructions ............... 35 Subtract line 34 from line 33. If zero or less, enter -0- .........36 Income limitation. Multiply line 35 by 20% (0.20) . . . . . . . . . . .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 . . . . . . .

38 DPAD under section 199A(g) allocated from an agricultural or horticultural cooperative. Don’t enter more than line 33 minus line 37 ................

39 Total qualified business income deduction. Add lines 37 and 38 . . . . . .40 Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 28 and 29. If zero or

261.

44,645. 8,929.

261.

0.

greater, enter -0- .....................( ) Form 8995-A (2021)

Form 8960

Department of the Treasury Internal Revenue Service (99)

Net Investment Income Tax—

Individuals, Estates, and Trusts

a Attach to your tax return.

a 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 Your social security number or EIN DANIEL L JOHNSON 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 |
| --- |
| 2 |
| 3 |
| 4c |
| 5d |
| 6 |
| 7 |
| 8 |

1 Taxable interest (see instructions) . . . . . . . . . . . . . . . . . . . . . . . 2 Ordinary dividends (see instructions) ...................... 3 Annuities (see instructions) ......................... 4 a Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see

3,967. 51,555.

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. |
| --- | --- |

0.

c Combine lines 4a and 4b ..........................

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 |  |
| --- | --- |
| 5c |  |

**C~~OP~~Y**

c Adjustment from disposition of partnership interest or S corporation stock (see instructions) ......................

d Combine lines 5a through 5c ........................ 6 Adjustments to investment income for certain CFCs and PFICs (see instructions) ....... 7 Other modifications to investment income (see instructions) .............. 8 Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7 ............. Part II Investment Expenses Allocable to Investment Income and Modifications

6,206,181. 6,261,703.

9a Investment interest expenses (see instructions) .......... b State, local, and foreign income tax (see instructions) ........ c Miscellaneous investment expenses (see instructions) ........ d Add lines 9a, 9b, and 9c ...................

10 Additional modifications (see instructions) .............11 Total deductions and modifications. Add lines 9d and 10 ........Part III Tax Computation

| 9a |  | 9d |
| --- | --- | --- |
| 9b | 2,275. |
| 9c |  |
| .. | ..... |
| .. | ..... | 10 |
| .. | ..... | 11 |

2,275. 2,275.

| 12 |
| --- |
| 16 |
| 17 |
| 20 |
| 21 |

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- ............ Individuals:

6,259,428.

13 Modified adjusted gross income (see instructions) ......... 13

6,275,703.

14 Threshold based on filing status (see instructions) ......... 15 Subtract line 14 from line 13. If zero or less, enter -0- ........

| 14 | 200,000. |
| --- | --- |
| 15 | 6,075,703. |

16 Enter the smaller of line 12 or line 15 ...................... 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) ...................... Estates and Trusts:

18a Net investment income (line 12 above) ............. 18a

6,075,703. 230,877.

b Deductions for distributions of net investment income and deductions under section 642(c) (see instructions) ............... c Undistributed net investment income. Subtract line 18b from line 18a (see

instructions). If zero or less, enter -0- ............. 19a Adjusted gross income (see instructions) ............ b Highest tax bracket for estates and trusts for the year (see instructions) . . c Subtract line 19b from line 19a. If zero or less, enter -0- .......

| 18b |  |
| --- | --- |
| 18c |  |
| 19a |  |
| 19b |  |
| 19c |  |

20 Enter the smaller of line 18c or line 19c ..................... 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) ................... For Paperwork Reduction Act Notice, see your tax return instructions. Form 8960 (2021) **BAA** REV 09/09/22 PRO

Form 4562

Department of the Treasury Internal Revenue Service (99)

Depreciation and Amortization

(Including Information on Listed Property)

a Attach to your tax return.

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

| Business or activity to which this form relates  Section 179 Summary |
| --- |

OMB No. 1545-0172 2021

Attachment

Sequence No. 179

Name(s) shown on return Identifying number DANIEL L JOHNSON 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 |
| --- | --- | --- | --- | --- | --- |
| . | .. | . | .. | ..... | 2 |
|  |  |  |  | ..... | 3 |
|  | . | . | .. | ..... | 4 |
| ...... | .. | . | .. | ..... | 5 |
| (b) Cost (business use only) | | (c) Elected cost | | | |
|  | | 1. | | | |
|  | |  | | | |
| ...... | 7 |  | | | |
|  |  |  | . | ..... | 8 |
| ...... | .. | . | .. | ..... | 9 |
|  | .. | . | .. | ..... | 10 |
|  |  |  |  |  | 11 |
|  |  |  |  | ..... | 12 |
| **Y** | a |  | 13 | 0. |  |

1,050,000.

2 Total cost of section 179 property placed in service (see instructions)

3 Threshold cost of section 179 property before reduction in limitation (see instructions) .4 Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -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 .........

6 (a) Description of property

from Schedule K-1

7 Listed property. Enter the amount from line 29 ...

8 Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7 9 Tentative deduction. Enter the smaller of line 5 or line 8

10 Carryover of disallowed deduction from line 13 of your 2020 Form 4562 .

11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions 12 Section 179 expense deduction. Add lines 9 and 10, but don’t enter more than line 11 .13 Carryover of disallowed deduction to 2022. Add lines 9 and 10, less line 12

**~~O~~~~P~~**

Note: Don’t use Part II or Part III below for listed property. Instead, use Part V.

2,620,000. 0.

1,050,000.

1.

1.

21,200.

1.

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

| 14 |
| --- |
| 15 |
| 16 |

during the tax year. See instructions ....................... 15 Property subject to section 168(f)(1) election .................... 16 Other depreciation (including ACRS) ......................

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

| 17 |
| --- |

17 MACRS deductions for assets placed in service in tax years beginning before 2021 ....... 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 ...................... a

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

| (b) Month and year placed in  service | **C**  (c) Basis for depreciation (business/investment use only—see instructions) | (d) Recovery period | (e) Convention | (f) Method |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  | 25 yrs. |  | S/L |
|  |  | 27.5 yrs. | MM | S/L |
|  |  | 27.5 yrs. | MM | S/L |
|  |  | 39 yrs. | MM | S/L |
|  |  |  | MM | S/L |

(a) Classification of property(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

h Residential rental

property

i Nonresidential real

property

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

20a Class life b 12-year

c 30-year

d 40-year

|  |  |  |  | S/L |
| --- | --- | --- | --- | --- |
|  |  | 12 yrs. |  | S/L |
|  |  | 30 yrs. | MM | S/L |
|  |  | 40 yrs. | MM | S/L |

Part IV Summary (See instructions.)

21 Listed property. Enter amount from line 28 .............

| .. | ..... | 21 |
| --- | --- | --- |
|  | . | 22 |
| 23 |  |  |

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

23 For assets shown above and placed in service during the current year, enter the

portion of the basis attributable to section 263A costs .........

For Paperwork Reduction Act Notice, see separate instructions. Form 4562 (2021) **BAA** REV 09/09/22 PRO

Form 8582

Department of the Treasury Internal Revenue Service (99)

Passive Activity Loss Limitations

a See separate instructions.

a Attach to Form 1040, 1040-SR, or 1041.

a Go to *www.irs.gov/Form8582* for instructions and the latest information.

OMB No. 1545-1008 2021

Attachment

Sequence No. 858

Name(s) shown on return Identifying number DANIEL L JOHNSON 529-95-0491 Part I 2021 Passive Activity Loss

Caution: Complete Parts IV and V before completing Part I.

| 1d |
| --- |
| 2d |
| 3 |

Rental Real Estate Activities With Active Participation (For the definition of active participation, see *Special Allowance for Rental Real Estate Activities* in the instructions.)

1 a Activities with net income (enter the amount from Part IV, column (a)) . . . 1a

b Activities with net loss (enter the amount from Part IV, column (b)) .... c Prior years’ unallowed losses (enter the amount from Part IV, column (c)) . .

| 1b | ( ) |
| --- | --- |
| 1c | ( ) |

d Combine lines 1a, 1b, and 1c ........................ All Other Passive Activities

2a Activities with net income (enter the amount from Part V, column (a)) . . . 2a

191.

b Activities with net loss (enter the amount from Part V, column (b)) .... c Prior years’ unallowed losses (enter the amount from Part V, column (c)) . .

| 2b | -5,105.  ( ) |
| --- | --- |
| 2c | ( ) |

d Combine lines 2a, 2b, and 2c ........................ **~~C~~O~~P~~Y**

3 Combine lines 1d and 2d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c or 2c. Report the losses on the forms and schedules normally used .................

If line 3 is a loss and: • Line 1d is a loss, go to Part II.

• Line 2d is a loss (and line 1d is zero or more), skip Part II and go to line 10.

-4,914. -4,914.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II. Instead, go to line 10.

Part II Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

| 4 |
| --- |
| 8 |
| 9 |

4 Enter the smaller of the loss on line 1d or the loss on line 3 .............. 5 Enter $150,000. If married filing separately, see instructions ...... 5

6 Enter modified adjusted gross income, but not less than zero. See instructions Note: If line 6 is greater than or equal to line 5, skip lines 7 and 8 and enter -0- on line 9. Otherwise, go to line 7.

7 Subtract line 6 from line 5 .................

| 6 |  |
| --- | --- |
| 7 |  |

8 Multiply line 7 by 50% (0.50). Do not enter more than $25,000. If married filing separately, see instructions 0.

9 Enter the smaller of line 4 or line 8 ...................... Part III Total Losses Allowed

191.

| 10 |
| --- |
| 11 |

10 Add the income, if any, on lines 1a and 2a and enter the total ..............

11 Total losses allowed from all passive activities for 2021. Add lines 9 and 10. See instructions to find 191.

out how to report the losses on your tax return . . . . . . . . . . . . . . . . . . Part IV Complete This Part Before Part I, Lines 1a, 1b, and 1c. See instructions.

Name of activity

| Current year | | Prior years |  |
| --- | --- | --- | --- |
| (a) Net income (line 1a) | (b) Net loss  (line 1b) | (c) Unallowed loss (line 1c) | (d) Gain |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Overall gain or loss

(e) Loss

Total. Enter on Part I, lines 1a, 1b, and 1c a

For Paperwork Reduction Act Notice, see instructions. Form 8582 (2021) **BAA** REV 09/09/22 PRO

Form 8582 (2021) Page 2 Part V Complete This Part Before Part I, Lines 2a, 2b, and 2c. See instructions.

| Current year | | Prior years |  |
| --- | --- | --- | --- |
| (a) Net income (line 2a) | (b) Net loss  (line 2b) | (c) Unallowed loss (line 2c) | (d) Gain |
| 0. | 4,948. |  |  |
| 191. | 0. |  | 191. |
| 0. | 157. |  |  |
|  |  |  |  |
|  |  |  |  |
| 191. | 5,105. |  |  |

Overall gain or loss

Name of activity

(e) Loss

BRIDGE OPPORTUNITY ZONE FUND IV LP 4,948. CYNOSURE PARTNERS 2020 PV LP

GRIFFIN CAPITAL QUALIFIED OPPORTUNITY 157.

Total. Enter on Part I, lines 2a, 2b, and 2c a

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

Name of activity

Total ............

| Form or schedule and line number to be reported on (see instructions) | (a) Loss | (b) Ratio | (c) Special  allowance |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| ..... a |  | **Y**1.00 |  |

(d) Subtract column (c) from column (a).

Part VII Allocation of Unallowed Losses. See instructions.

| Form or schedule and line number to be reported on (see instructions) | (a) Loss **P** | (b) Ratio |
| --- | --- | --- |
| E Ln 28B | 4,948. | 0.96924584 |
| E Ln 28D | 157. | 0.03075416 |
|  |  |  |
|  |  |  |
|  |  |  |
| ..... a **O** | 5,105. | 1.00 |

Name of activity(c) Unallowed loss

BRIDGE OPPORTUNITY ZONE FUND IV LP 4,763. GRIFFIN CAPITAL QUALIFIED OPPORTUNITY 151.

**~~C~~**

Total ..............

Part VIII Allowed Losses. See instructions.

| Form or schedule and line number to be reported on (see instructions) | (a) Loss | (b) Unallowed loss |
| --- | --- | --- |
| E Ln 28B | 4,948. | 4,763. |
| E Ln 28D | 157. | 151. |
|  |  |  |
|  |  |  |
|  |  |  |
| ..... a | 5,105. | 4,914. |

4,914.

Name of activity(c) Allowed loss

BRIDGE OPPORTUNITY ZONE FUND IV LP 185. GRIFFIN CAPITAL QUALIFIED OPPORTUNITY 6.

Total ..............

REV 09/09/22 PRO

191.

Form 8582 (2021)

Form 8997

Department of the Treasury Internal Revenue Service

Initial and Annual Statement of

Qualified Opportunity Fund (QOF) Investments a Go to *www.irs.gov/Form8997* for the latest information. a Attach to your tax return.

OMB No. 1545-0123 2021

Attachment

Sequence No. 997

Name Tax identification number (see instructions) DANIEL L JOHNSON 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.

| (b)  Date QOF  investment  acquired  (MM/DD/YYYY) | (c)  Description of QOF investment  (for example, 100 shares or 25% interest) | (d)  Special gain  code |  |
| --- | --- | --- | --- |
| (e)  Amount of short-term deferred gain  remaining in QOF |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  | **Y** |  |  |
|  | Enter the totals, if any, from continuation sheet ........... | . a |  |
|  | Enter the totals from columns (e) and (f) .............. | . a |  |

(a)

Qualified

Opportunity

Fund (QOF)

EIN

1

2

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

Deferred gain held in QOF

(f)

Amount of long-term

deferred gain

remaining in QOF

(a)

Qualified Opportunity

Fund (QOF) EIN

| (b)  Date QOF  investment  acquired  (MM/DD/YYYY) | **OP**  (c)  Description of interest acquired  (for example, 100 shares or 25% interest) | (d)  Special gain  code |  |
| --- | --- | --- | --- |
| (e)  Amount of short-term deferred gain  remaining in QOF |
| 12/10/2021 | GTIS QUALIFIED OPPORTUNITY FUND |  |  |
| 12/31/2021 | BRIDGE CAPITAL OPPORTUNITY ZONE |  |  |
| 12/31/2021 | GRIFFIN CAPITAL QUALIFIED OPPORTUNITY **C** |  |  |
|  |  |  |  |
|  |  |  |  |
|  | Enter the totals, if any, from continuation sheet ........... | . a |  |
|  | Enter the totals from columns (e) and (f). See instructions for reporting on Form 8949 | a |  |

Deferred gain invested in QOF

(f)

Amount of long-term

deferred gain

remaining in QOF

83-3873722 350,000. 85-4323971 300,000. 85-3274399 350,000.

1

2

Applicability of Special Rules Regarding the Waiver of Certain Treaty Benefits

1,000,000.

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.

For Paperwork Reduction Act Notice, see your tax return instructions. Form 8997 (2021) BAA REV 09/09/22 PRO

Form 8997 (2021) Page 2 Part III Inclusion Events and Certain Other Transfers During the Current Tax Year

| (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 |  |
| --- | --- | --- | --- |
| (e)  Amount of previously deferred short-term gain now included in taxable income |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  | Enter the totals, if any, from continuation sheet ........... | . a |  |
|  | Enter the totals from columns (e) and (f). See instructions for reporting on Form 8949 | a |  |

Deferred gain included

(a)

Qualified

Opportunity Fund (QOF)

EIN

1

2

**~~Y~~**

due to disposition of QOF interest

(f)

Amount of previously

deferred long-term

gain now included in

taxable income

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)

| (b)  Date QOF  investment  acquired  (MM/DD/YYYY) | **P**  (c)  Description of interest acquired  (for example, 100 shares or 25% interest) | (d)  Special gain  code |  |
| --- | --- | --- | --- |
| (e)  Amount of short-term deferred gain  invested in QOF |
| 12/10/2021 | GTIS QUALIFIED OPPORTUNITY FUND **O** |  |  |
| 12/31/2021 | BRIDGE CAPITAL OPPORTUNITY ZONE |  |  |
| 12/31/2021 | GRIFFIN CAPITAL QUALIFIED OPPORTUNITY **C** |  |  |
|  |  |  |  |
|  |  |  |  |
|  | Enter the totals, if any, from continuation sheet ........... | . a |  |
|  | Enter the totals from columns (e) and (f) .............. | . a |  |

(a)

Qualified Opportunity

Fund (QOF) EIN

Deferred gain invested in QOF investment

(f)

Amount of long-term

deferred gain

invested in QOF

83-3873722 350,000. 85-4323971 300,000. 85-3274399 350,000.

1

2

REV 09/09/22 PRO

1,000,000. Form 8997 (2021)

Form 4868

Department of the Treasury Internal Revenue Service (99)

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

a 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

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

**CO~~P~~Y**

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*.

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.

Purpose of Form

General Instructions

1. Properly estimate your 2021 tax liability using the information

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,

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.

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

F! CAUTION

*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*

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:

*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.

Form 4868

d DETACH HERE d

Application for Automatic Extension of Time

REV 09/09/22 PRO 1555

Department of the Treasury Internal Revenue Service (99)

To File U.S. Individual Income Tax Return 2021 For calendar year 2021, or other tax year beginning , 2021, and ending , .

Part I Identification

1

DANIEL L JOHNSON

134 SOUTH 1160 WEST CIRCLE SAINT GEORGE,UT 84770

Part II Individual Income Tax

4 Estimate of total tax liability for 2021 . . $ 5 Total 2021 payments ...... 6 Balance due. Subtract line 5 from line 4.

See instructions ........ 7 Amount you’re paying (see instructions) . a

1,482,721. 38,004.

1,444,717. ~~1,450,000.~~

2 3 529-95-0491

8 Check here if you’re “out of the country” and a U.S. citizen or resident. See instructions ...... a 9 Check here if you file Form 1040-NR and didn’t receive wages as an employee subject to U.S. income tax withholding ............. a

529950491 QQ JOHN 30 0 202112 670

**Form 1040 Forms W-2 & W-2G Summary 2021** G Keep for your records

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

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

**Form W-2 Summary**

| **Taxpayer** | **Spouse** |
| --- | --- |
| 46,007.  **P~~Y~~**  0.  ~~5,004.~~  52,364.  3,247.  52,364.  759.  46,007.  2,280. |  |

**Box No. Description Total**

**1** Total wages, tips and compensation: Non-statutory & statutory wages not on Sch C Statutory wages reported on Schedule C Foreign wages included in total wages Unreported tips

**2** Total federal tax withheld

**3 & 7** Total social security wages/tips **4** Total social security tax withheld **5** Total Medicare wages and tips **6** Total Medicare tax withheld

**8** Total allocated tips

46,007.

0.

~~5,004.~~ 52,364. 3,247. 52,364. 759.

**9** Not used

**C~~O~~**

**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

**17** Total state tax withheld

**19** Total local tax withheld

46,007. 2,280.

**Form 1099-B Worksheet 2021**

G Keep for your records

Name(s) Shown on Return Social Security No. DANIEL L JOHNSON 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.*  **Proceeds Cost Basis**  **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.) |
| --- |

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

**~~O~~**

| **Sale Results for Form 8949** | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **#** | **8949 Box** | **Description** | **Proceeds CSale** | **Cost**  **Basis** | **Adj.**  **Code(s)** | **Adjustment**  **Amount** | **Gain or**  **(Loss)** | **S/**  **L** |
|  | 1E | ZONOS | 7,125,000.00 | 0.00 |  |  | 7,125,000.00L |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
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| **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 |  | 0.007,125,000.00 |  | 7,125,000.00 |  |
| Box F |  |  |  |  |  |  |
| **Totals** | 7,125,000.00 |  | 0.007,125,000.00 |  | 7,125,000.00 |  |

Page **2**

| **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

**~~COP~~~~Y~~**

**State ID**

State Backup Witholding

Total State Backup Withholding

Total Collectible Gain/(Loss)

Qualified Small Business (QSB) gain (Sec 1202) Maximum 50% exclusion gain

Maximum 60% exclusion gain

Maximum 75% exclusion gain

Maximum 100% exclusion gain

**PDF Attachment**

| Total Gain | Excluded Gain | Net Gain |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Does a statement need to be attached to this return? Yes X No

**Form 1099-B Worksheet 2021**

G Keep for your records

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

**Name of reporting financial institution**

FIDELITY

~~636-128278 04-3523567~~

**Acct Number Reporter’s Tax ID**

~~T~~

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.*  **Proceeds Cost Basis**  ~~194,547.32 194,121.44~~  **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.) |
| --- |

**~~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** | | | |  | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **8949**  **Box** | **Date Sold** | | **Date Acquired** | | **Sales Price**  **(Proceeds)** | | | **Cost or**  **Other Basis** | | **Disallowed**  **Wash Sale** |
| **Adjustment Amount\*** | | **Adjustment Code(s)\*** | | **Holding Period** | | | **Basis Reported to IRS? Y** | | **Reported on**  **Form 1099B?** | |
|  |  | | | |  | | | | | |
|  |  | |  | |  | | |  | |  |
|  | |  | |  | | Yes No | | | Yes No | |
|  |  | | | | **~~P~~** | | | | | |
|  |  | |  | |  | | |  | |  |
|  | |  | |  | | Yes No | | | Yes No | |
|  |  | | | |  | | | | | |
|  |  | |  | |  | | |  | |  |
|  | |  | |  | | Yes No | | | Yes No | |
|  |  | | | |  | | | | | |
|  |  | |  | |  | | |  | |  |
|  | |  | |  | | Yes No | | | Yes No | |

**~~O~~**

| **Sale Results for Form 8949** | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **#** | **8949 Box** | **Description** | **Proceeds CSale** | **Cost**  **Basis** | **Adj.**  **Code(s)** | **Adjustment**  **Amount** | **Gain or**  **(Loss)** | **S/**  **L** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |

| **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 |  |

Page **2**

| **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

**~~COP~~~~Y~~**

**State ID**

State Backup Witholding

Total State Backup Withholding

Total Collectible Gain/(Loss)

Qualified Small Business (QSB) gain (Sec 1202) Maximum 50% exclusion gain

Maximum 60% exclusion gain

Maximum 75% exclusion gain

Maximum 100% exclusion gain

**PDF Attachment**

| Total Gain | Excluded Gain | Net Gain |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Does a statement need to be attached to this return? Yes X No

**Form 1099-B Worksheet 2021**

G Keep for your records

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

**Name of reporting financial institution**

FIDELITY

~~636-166822 04-3523567~~

**Acct Number Reporter’s Tax ID**

~~T~~

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.*  **Proceeds Cost Basis**  **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.) |
| --- |

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

**~~O~~**

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

| **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 | 1,101.83W |  |
| Box B |  |  |  |  |  |  |
| Box C |  |  |  |  |  |  |
| Box D |  |  |  |  |  |  |
| Box E |  |  |  |  |  |  |
| Box F |  |  |  |  |  |  |
| **Totals** | 92,398.67 | 91,529.46 | 869.21 | 232.62 | 1,101.83 |  |

Page **2**

| **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 | 233.00W |  | 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

**~~COP~~~~Y~~**

**State ID**

State Backup Witholding

Total State Backup Withholding

Total Collectible Gain/(Loss)

Qualified Small Business (QSB) gain (Sec 1202) Maximum 50% exclusion gain

Maximum 60% exclusion gain

Maximum 75% exclusion gain

Maximum 100% exclusion gain

**PDF Attachment**

| Total Gain | Excluded Gain | Net Gain |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Does a statement need to be attached to this return? Yes X No

**Capital Gain (Loss) Adjustments Worksheet 2021** G Keep for your records

Name(s) Shown on Return Social Security No. DANIEL L JOHNSON 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**

Z 350,000.00

**Adjustment Code(s) Adjustment Amount**

**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.)

**CO~~P~~Y**

| **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 Social Security No. DANIEL L JOHNSON 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.

**~~COP~~~~Y~~**

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)

X

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):

| **Part IV** |
| --- |

Cost of QOF investment

Date of QOF investment

Taxpayer identification number of QOF

Amount of deferred taxable gain

QOF holding period

Special gain code, if applicable

**Amounts That Will Be Reported on Forms Other Than Form 8949**

350,000.00 12/10/2021 83-3873722 350,000.00 L

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 2021** G Keep for your records

Name(s) Shown on Return Social Security No. DANIEL L JOHNSON 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**

Z 300,000.00

**Adjustment Code(s) Adjustment Amount**

**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.)

**CO~~P~~Y**

| **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 Social Security No. DANIEL L JOHNSON 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.

**~~COP~~~~Y~~**

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)

X

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):

| **Part IV** |
| --- |

Cost of QOF investment

Date of QOF investment

Taxpayer identification number of QOF

Amount of deferred taxable gain

QOF holding period

Special gain code, if applicable

**Amounts That Will Be Reported on Forms Other Than Form 8949**

300,000.00 12/31/2021 85-4323971 300,000.00 L

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 2021** G Keep for your records

Name(s) Shown on Return Social Security No. DANIEL L JOHNSON 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**

Z 350,000.00

**Adjustment Code(s) Adjustment Amount**

**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.)

**CO~~P~~Y**

| **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 Social Security No. DANIEL L JOHNSON 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.

**~~COP~~~~Y~~**

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)

X

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):

| **Part IV** |
| --- |

Cost of QOF investment

Date of QOF investment

Taxpayer identification number of QOF

Amount of deferred taxable gain

QOF holding period

Special gain code, if applicable

**Amounts That Will Be Reported on Forms Other Than Form 8949**

350,000.00 12/31/2021 85-3274399 350,000.00 L

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

**DANIEL L JOHNSON 529-95-0491 1**

**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**

**eignEIN**

**Basi s**

**Com p**

**Not At**

**Risk**

**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 E TORKABC,

P 85-3274399 6.

LLCS 81-1144841 24,807. **Total** 6. 24,807.

**Form 1116: Foreign Tax Credit Foreign Taxes (A)**

**CO~~P~~~~Y~~**

**Line 3 Explanation Statement Other Deduction Statement**

CLAIMING FOREIGN TAX

**Utah State Tax Commission**

**2021**

**TC-40 40101**

**Utah Individual Income Tax Return**

**All State Income Tax Dollars Fund Education**

INTUIT 1555 • Amended Return - enter code: (see instructions)

USTC ORIGINAL FORM

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

134 SOUTH 1160 WEST CIRCLE

City State ZIP+4 Foreign country (if not U.S.)

page 3, Part 1

SAINT GEORGE UT

84770

| • **2 Qualifying Dependents**  2  **a** Dependents age 16 and under **b** Other dependents  2  **c** Total (add lines a and b)  Dependents must be claimed for the child tax credit on your federal return. See instructions. |
| --- |

**1 Filing Status - enter code 3 Election Campaign Fund 1** = Single Does not increase your tax or reduce your refund. 4

• **2** = Married filing jointly Enter the code for the Yourself Spouse **3** = Married filing separately party of your choice. • • **4** = Head of household See instructions for

**COP~~Y~~**

**5** = Qualifying widow(er) code letters or go to **incometax.utah.gov/elect**. If using code 2 or 3, enter spouse’s name and SSN above If no contribution, enter **N**.

4 Federal adjusted gross income from federal return • 4 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 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 10 **Utah tax** - multiply line 9 by 4.95% (.0495) (not less than zero) • 10

6275703 6275703

6275703 310647

11 Utah personal exemption (multiply line 2c by $1,750) • 11 12 Federal standard or itemized deductions • 12 13 Add line 11 and line 12 13 14 State income tax included in federal itemized deductions • 14 15 Subtract line 14 from line 13 15 16 Initial credit before phase-out - multiply line 15 by 6% (.06) • 16

17 Enter: **$15,095** (if single or married filing separately); **$22,643** (if head • 17 of household); or **$30,190** (if married filing jointly or qualifying widower) 18 Income subject to phase-out - subtract line 17 from line 9 (not less than zero) 18

19 Phase-out amount - multiply line 18 by 1.3% (.013) • 19

3500

19471

22971

2280

20691

1241

22643

6253060 81290

**Electronic filing**

**is quick, easy and free, and will**

**speed up your refund.**

**To learn more,**

**go to**

**tap.utah.gov**

20 Taxpayer tax credit - subtract line 19 from line 16 (not less than zero) • 20 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 REV 04/23/22 PRO

0

310647

40102**Utah Individual Income Tax Return (continued) TC-40** Pg. 2

529950491 JOHNSON

INTUIT

SSN Last name **2021** USTC ORIGINAL FORM

23 Enter tax from TC-40, page 1, line 22 23 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) • 25 Non or Part-year resident, complete and enter the UTAH TAX from TC-40B, line 41

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 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 **COPY**

32 **Total tax, use tax and additions to tax** (add lines 27 through 31) 32 33 Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1) • 33 34 Credit for Utah income taxes prepaid from TC-546 and 2020 refund applied to 2021 • 34 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

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

44 Voluntary subtractions from refund (not greater than line 43) • 44 Enter the total from page 3, Part 5

310647 310647 310647

310647 2280

310000

312280 1633

45 **DIRECT DEPOSIT YOUR REMAINING REFUND** - provide account information (see instructions for foreign accounts) checking savings 324377516 746008009573 X

• Routing number • Account number Account type: • •

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

| Name of designee (if any) you authorize to discuss this return  NATE STAHELI | Designee’s telephone number 4356568138 |
| --- | --- |
| Preparer’s signature Date | Preparer’s telephone number 4356568138 |
| STAHELI & JACOBSEN CPA'S  Firm’s name  PO BOX 911030 SAINT GEORGE UT 84791  and address | |

Third Party Designee PIN

Designee • Preparer’s PTIN Paid • Preparer’s Preparer’s EIN Section •

11111

P00296497 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

40109**Part 1 - Utah Withholding Tax Schedule TC-40W** Pg. 1

INTUIT

SSN 529-95-0491 Last name JOHNSON **2021** USTC ORIGINAL FORM

**Line Explanations IMPORTANT**

1 Employer/payer ID number from W-2 box “b” or 1099 **Do not send your W-2s or 1099s with your return.** Instead enter 2 Utah withholding ID number from W-2 box “15” or 1099 W-2 or 1099 information below, but **only** if there is Utah withholding **(14 characters, ending in WTH, no hyphens)** on the form.

3 Employer/payer name and address from W-2 box “c” or 1099

4 Enter “X” if reporting Utah withholding from form 1099 Use additional forms TC-40W if you have more than four W-2s and/or 5 Employee’s Social Security number from W-2 box “a” or 1099 1099s with Utah withholding tax.

6 Utah wages or income from W-2 box “16” or 1099

7 Utah withholding tax from W-2 box “17” or 1099 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 Second W-2 or 1099**

811144841

1 1

14111128003WTH

2 (14 characters, no hyphens) 2 (14 characters, no hyphens)

TORKABC LLC

**C~~O~~PY**

3 3

134 SOUTH 1160 WEST CIRCLE

SAINT GEORGE UT84770

4 4

529950491

5 5

46007.

6 6

2280.

7 7

**Third W-2 or 1099 Fourth W-2 or 1099**

1 1

2 (14 characters, no hyphens) 2 (14 characters, no hyphens) 3 3

4 4

5 5

6 6

7 7

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

**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.**

REV 04/23/22 PRO

2280.

Utah State Tax Commission

**Individual Income Tax Prepayment Coupon** (This is NOT an extension form) **TC-546**

**Prepayment**

**Payment Worksheet**

INTUIT

Rev. 4/13

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.

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 \_\_\_\_\_

8. Total prepayments for this year -

(add lines 6 and 7) 8 \_\_\_\_\_

**Interest**

**COPY**9. Minimum payment due -

2280

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**.

(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**

INTUIT

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

**TC-546**

**Prepayment Coupon**Rev. 4/13 **IPP**

Primary taxpayer name Social Security no.

Tax year ending

DANIEL L JOHNSON

529950491

**2021**

USTC Use Only

Secondary taxpayer name Social Security no. **004**

Address

134 SOUTH 1160 WEST CIRCLE

City State ZIP code

SAINT GEORGE UT

84770

REV 04/23/22 PRO

**Prepayment amount enclosed $ 00** 310000

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.

**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.

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