Electronic Filing Instructions for your 2020 Federal Tax Return

Important: Your taxes are not finished until all required steps are completed.

Sugarmaa Dorjdagva
2550 Waterview Dr, Apt. 154
Northbrook, IL 60062

Balance Due/ Refund

Your federal tax return (Form 1040) shows a refund due to you in the amount of $404.00. Applicable fees were deducted from your original refund amount of $404.00. Your refund is now $339.00. Because you chose to have your TurboTax fees deducted from your refund, you will receive e-mail from Civista Bank, which handles this transaction. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 8378116845 Routing Transit Number: 125008547.

When Will You Get Your Refund?

The IRS issued more than 9 out of 10 refunds to taxpayers in less than 21 days last year. The same results are expected in 2021. To get your estimated refund date from TurboTax, log into My TurboTax at www.turbotax.com. If you do not receive your refund within 21 days, or the amount you get is not what you expected, contact the Internal Revenue Service directly at 1-800-829-4477. You can also check www.irs.gov and select the "Where's my refund?" link.

What You Need to Keep

Your Electronic Filing Instructions (this form)
Printed copy of your federal return

2020 Federal Tax Return Summary

Adjusted Gross Income	$	51,600.00
Taxable Income	$	32,950.00
Total Tax	$	1,675.00
Total Payments/Credits	$	2,079.00
Amount to be Refunded	$	404.00
Effective Tax Rate		3.25%

Form 1040 U.S. Individual Income Tax Return 2020

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

Check only one box.

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

Your first name and middle initial Sugarmaa	Last name Dorjdagva	**Your social security number** 183-51-4747
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. 2550 Waterview Dr		Apt. no. 154	**Presidential Election Campaign** Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. Northbrook	State IL	ZIP code 60062	
Foreign country name	Foreign province/state/county	Foreign postal code	

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire 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, 1956 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1956 ☐ Is blind

Dependents (see instructions):

If more than four dependents, see instructions and check here ▶ ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✔ if qualifies for (see instructions): Child tax credit	Credit for other dependents
Amina	Batsaikhan	826-60-6023	Daughter	☒	☐
				☐	☐
				☐	☐
				☐	☐

Attach Sch. B if required.

1	Wages, salaries, tips, etc. Attach Form(s) W-2				1	
2a	Tax-exempt interest	2a		b Taxable interest	2b	0.
3a	Qualified dividends	3a		b Ordinary dividends	3b	
4a	IRA distributions	4a		b Taxable amount	4b	
5a	Pensions and annuities	5a		b Taxable amount	5b	
6a	Social security benefits	6a		b Taxable amount	6b	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐				7	40,862.
8	Other income from Schedule 1, line 9				8	10,738.
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** ▶				9	51,600.
10	Adjustments to income:					
a	From Schedule 1, line 22			10a		
b	Charitable contributions if you take the standard deduction. See instructions			10b		
c	Add lines 10a and 10b. These are your **total adjustments to income** ▶				10c	
11	Subtract line 10c from line 9. This is your **adjusted gross income** ▶				11	51,600.
12	**Standard deduction or itemized deductions** (from Schedule A)				12	18,650.
13	Qualified business income deduction. Attach Form 8995 or Form 8995-A				13	
14	Add lines 12 and 13				14	18,650.
15	**Taxable income.** Subtract line 14 from line 11. If zero or less, enter -0-				15	32,950.

Standard Deduction for—
- Single or Married filing separately, $12,400
- Married filing jointly or Qualifying widow(er), $24,800
- Head of household, $18,650
- If you checked any box under *Standard Deduction,* see instructions.

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

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐ ________			16	3,675.
17	Amount from Schedule 2, line 3			17	
18	Add lines 16 and 17			18	3,675.
19	Child tax credit or credit for other dependents			19	2,000.
20	Amount from Schedule 3, line 7			20	
21	Add lines 19 and 20			21	2,000.
22	Subtract line 21 from line 18. If zero or less, enter -0-			22	1,675.
23	Other taxes, including self-employment tax, from Schedule 2, line 10			23	0.
24	Add lines 22 and 23. This is your **total tax** ▶			24	1,675.
25	Federal income tax withheld from:				
a	Form(s) W-2	25a			
b	Form(s) 1099	25b	2,079.		
c	Other forms (see instructions)	25c			
d	Add lines 25a through 25c			25d	2,079.
26	2020 estimated tax payments and amount applied from 2019 return			26	
27	Earned income credit (EIC)	27			
28	Additional child tax credit. Attach Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Recovery rebate credit. See instructions	30			
31	Amount from Schedule 3, line 13	31			
32	Add lines 27 through 31. These are your **total other payments and refundable credits** ▶			32	
33	Add lines 25d, 26, and 32. These are your **total payments** ▶			33	2,079.

- If you have a qualifying child, attach Sch. EIC.
- If you have nontaxable combat pay, see instructions.

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**	34	404.
35a	Amount of line 34 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐	35a	404.
▶ b	Routing number 125008547 ▶ **c** Type: ☒ Checking ☐ Savings		
▶ d	Account number 8378116845		
36	Amount of line 34 you want **applied to your 2021 estimated tax** ▶	36	

Direct deposit? See instructions.

Amount You Owe

For details on how to pay, see instructions.

37	Subtract line 33 from line 24. This is the **amount you owe now** ▶	37	
	Note: Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.		
38	Estimated tax penalty (see instructions) ▶	38	

Third Party Designee

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

Designee's name ▶

Phone no. ▶

Personal identification number (PIN) ▶

Sign Here

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

Joint return? See instructions. Keep a copy for your records.

Your signature

Date

Your occupation: Nail Technician Assistant

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

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

Date

Spouse's occupation

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

Phone no.

Email address

Paid Preparer Use Only

Preparer's name

Preparer's signature

Date

PTIN

Check if: ☐ Self-employed

Firm's name ▶ Self-Prepared

Phone no.

Firm's address ▶

Firm's EIN ▶

SCHEDULE 1
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Income and Adjustments to Income

▶ Attach to Form 1040, 1040-SR, or 1040-NR.
▶ Go to *www.irs.gov/Form1040* for instructions and the latest information.

OMB No. 1545-0074

2020

Attachment Sequence No. 01

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

Your social security number: 183-51-4747

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions) ▶		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	20,938.
8	Other income. List type and amount ▶ UCE -10,200.	8	-10,200.
9	Combine lines 1 through 8. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	9	10,738.

Part II Adjustments to Income

10	Educator expenses	10	
11	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	11	
12	Health savings account deduction. Attach Form 8889	12	
13	Moving expenses for members of the Armed Forces. Attach Form 3903	13	
14	Deductible part of self-employment tax. Attach Schedule SE	14	
15	Self-employed SEP, SIMPLE, and qualified plans	15	
16	Self-employed health insurance deduction	16	
17	Penalty on early withdrawal of savings	17	
18a	Alimony paid	18a	
b	Recipient's SSN ▶		
c	Date of original divorce or separation agreement (see instructions) ▶		
19	IRA deduction	19	
20	Student loan interest deduction	20	
21	Tuition and fees deduction. Attach Form 8917	21	
22	Add lines 10 through 21. These are your **adjustments to income.** Enter here and on Form 1040, 1040-SR, or 1040-NR, line 10a	22	

For Paperwork Reduction Act Notice, see your tax return instructions. BAA REV 04/02/21 TTMac

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Capital Gains and Losses

▶ Attach to Form 1040, 1040-SR, or 1040-NR.
▶ Go to *www.irs.gov/ScheduleD* for instructions and the latest information.
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074
2020
Attachment Sequence No. **12**

Name(s) shown on return: Sugarmaa Dorjdagva

Your social security number: 183-51-4747

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ **Yes** ☐ **No**
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Part I Short-Term Capital Gains and Losses—Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	**(d)** Proceeds (sales price)	**(e)** Cost (or other basis)	**(g)** Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	**(h) Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b .	2,260,957.	2,218,288.		42,669.
1b Totals for all transactions reported on Form(s) 8949 with **Box A** checked	2,088,423.	2,107,794.	17,564.	-1,807.
2 Totals for all transactions reported on Form(s) 8949 with **Box B** checked				
3 Totals for all transactions reported on Form(s) 8949 with **Box C** checked				

4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 . .	4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your **Capital Loss Carryover Worksheet** in the instructions	6	( )
7 **Net short-term capital gain or (loss).** Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back	7	40,862.

Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	**(d)** Proceeds (sales price)	**(e)** Cost (or other basis)	**(g)** Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	**(h) Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b .				
8b Totals for all transactions reported on Form(s) 8949 with **Box D** checked				
9 Totals for all transactions reported on Form(s) 8949 with **Box E** checked				
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	11	
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	
13 Capital gain distributions. See the instructions	13	
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your **Capital Loss Carryover Worksheet** in the instructions	14	( )
15 **Net long-term capital gain or (loss).** Combine lines 8a through 14 in column (h). Then, go to Part III on the back	15	

For Paperwork Reduction Act Notice, see your tax return instructions. BAA REV 04/02/21 TTMac **Schedule D (Form 1040) 2020**

Part III Summary

16 Combine lines 7 and 15 and enter the result . . . . 16 40,862.

- 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 . . . . ▶ 18

19 If you are required to complete the **Unrecaptured Section 1250 Gain Worksheet** (see instructions), enter the amount, if any, from line 18 of that worksheet . . . . ▶ 19

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

☐ **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
- ($3,000), or if married filing separately, ($1,500)

} . . . . 21 (   )

Note: When figuring which amount is smaller, treat both amounts as positive numbers.

22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?

☐ **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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Go to *www.irs.gov/Form8949* for instructions and the latest information.

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

OMB No. 1545-0074

2020

Attachment Sequence No. **12A**

Name(s) shown on return: Sugarmaa Dorjdagva

Social security number or taxpayer identification number: 183-51-4747

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

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

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

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

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *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	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
1,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	10/14/20	10/16/20	12,375.	12,400.	W	25.	0.
3,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Various	11/16/20	38,431.	38,324.	W	968.	1,075.
2,300.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Various	11/18/20	30,460.	30,695.	W	370.	135.
7,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Various	11/23/20	90,587.	90,596.	W	691.	682.
5,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Various	11/24/20	71,778.	71,118.	W	210.	870.
11,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Various	12/04/20	181,055.	180,169.	W	90.	976.
14,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Various	12/07/20	237,973.	237,270.	W	1,117.	1,820.
2,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	03/19/20	03/19/20	47,999.	46,717.	W	598.	1,880.
2,995.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	Various	03/24/20	33,577.	61,503.	W	4,429.	-23,497.
270.00sh of 097023105 BOEING CO COM	Various	04/29/20	37,509.	38,238.	W	1,909.	1,180.
100.00sh of 097023105 BOEING CO COM	05/01/20	05/26/20	14,500.	14,660.	W	160.	0.
400.00sh of 097023105 BOEING CO COM	Various	12/03/20	95,835.	93,815.	W	13.	2,033.
400.00sh of 247361702 DELTA AIR LINES INC COM	05/01/20	05/01/20	9,936.	9,962.	W	26.	0.
800.00sh of 247361702 DELTA AIR LINES INC COM	05/01/20	05/26/20	19,599.	19,546.	W	24.	77.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) ▶			921,614.	945,013.		10,630.	-12,769.

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. BAA REV 04/02/21 TTMac

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Go to *www.irs.gov/Form8949* for instructions and the latest information.

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

OMB No. 1545-0074

2020

Attachment Sequence No. **12A**

Name(s) shown on return: Sugarmaa Dorjdagva

Social security number or taxpayer identification number: 183-51-4747

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

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

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *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	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
3,600.00sh of 247361702 DELTA AIR LINES INC COM	05/27/20	05/27/20	95,061.	95,208.	W	1,265.	1,118.
600.00sh of 247361702 DELTA AIR LINES INC COM	05/28/20	05/28/20	15,582.	15,700.	W	177.	59.
1,000.00sh of 247361702 DELTA AIR LINES INC COM	06/08/20	11/09/20	36,889.	36,890.	W	1.	0.
683.00sh of 247361702 DELTA AIR LINES INC COM	11/16/20	11/16/20	25,771.	25,603.	W	13.	181.
600.00sh of 247361702 DELTA AIR LINES INC COM	11/18/20	11/18/20	23,227.	23,119.	W	2.	110.
300.00sh of 247361702 DELTA AIR LINES INC COM	12/07/20	12/07/20	12,759.	12,780.	W	21.	0.
400.00sh of 247361702 DELTA AIR LINES INC COM	12/10/20	12/10/20	16,703.	16,715.	W	13.	1.
1,900.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Various	05/18/20	66,692.	65,743.	W	250.	1,199.
1,800.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Various	05/21/20	61,970.	62,228.	W	454.	196.
1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Various	05/27/20	41,369.	41,040.	W	459.	788.
600.00sh of 90353T100 UBER TECHNOLOGIES INC COM	05/28/20	05/28/20	20,978.	21,105.	W	127.	0.
1,400.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Various	06/02/20	50,300.	49,978.	W	11.	333.
1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Various	06/05/20	45,101.	44,492.	W	144.	753.
29.00sh of 90353T100 UBER TECHNOLOGIES INC COM	10/16/20	10/16/20	986.	986.	W	0.	0.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) ▶			513,388.	511,587.		2,937.	4,738.

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. BAA

REV 04/02/21 TTMac

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Go to *www.irs.gov/Form8949* for instructions and the latest information.

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

OMB No. 1545-0074

2020

Attachment
Sequence No. **12A**

Name(s) shown on return	Social security number or taxpayer identification number
Sugarmaa Dorjdagva	183-51-4747

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

Part I

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

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

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

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *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	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
150.00sh of 90353T100 UBER TECHNOLOGIES INC COM	10/21/20	10/22/20	5,310.	5,317.	W	7.	0.
500.00sh of 90353T100 UBER TECHNOLOGIES INC COM	11/13/20	11/13/20	23,222.	23,182.	W	4.	44.
600.00sh of 90353T100 UBER TECHNOLOGIES INC COM	12/03/20	12/03/20	31,776.	31,692.	W	53.	137.
1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Various	04/29/20	45,919.	45,336.	W	521.	1,104.
1,100.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Various	05/26/20	32,669.	32,318.	W	781.	1,132.
1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	05/28/20	05/28/20	35,180.	36,267.	W	1,212.	125.
1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Various	06/01/20	47,615.	47,161.	W	426.	880.
800.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	06/03/20	06/03/20	24,979.	25,033.	W	240.	186.
5,300.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Various	12/03/20	260,667.	259,433.	W	206.	1,440.
1,500.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Various	12/04/20	75,932.	75,235.	W	63.	760.
1,400.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Various	12/08/20	70,152.	70,220.	W	484.	416.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) ▶			653,421.	651,194.		3,997.	6,224.

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. BAA REV 04/02/21 TTMac

Tax History Report

► Keep for your records

2020

Name(s) Shown on Return
Sugarmaa Dorjdagva

Five Year Tax History:

	2016	2017	2018	2019	2020
Filing status			Single	HH	HH
Total income			1,940.	11,500.	51,600.
Adjustments to income			137.	813.	
Adjusted gross income			1,803.	10,687.	51,600.
Tax expense			0.	0.	1,347.
Interest expense					
Contributions					
Misc. deductions					
Other itemized ded'ns					
Total itemized/ standard deduction			12,000.	18,350.	18,650.
Exemption amount			0.	0.	0.
QBI deduction			0.	0.	
Taxable income			0.	0.	32,950.
Tax					3,675.
Alternative min tax					
Total credits				0.	2,000.
Other taxes			274.	1,625.	
Payments			140.	4,754.	2,079.
Form 2210 penalty					
Amount owed			134.		
Applied to next year's estimated tax				0.	
Refund				3,129.	404.
Effective tax rate %			-7.76	-44.48	3.25
**Tax bracket %			10.0	10.0	12.0

**Tax bracket % is based on Taxable income.

IMPORTANT DISCLOSURES

If you are owed a federal tax refund, you have a right to choose how you will receive the refund. There are several options available to you. Some options cost money and some options are free. Please read about these options below.

You can file your federal tax return electronically or by paper and obtain your federal tax refund *directly* from the Internal Revenue Service ("IRS") *for free.* If you file your tax return electronically, you can receive a refund check directly from the IRS through the U.S. Postal Service in 21 to 28 days from the time you file your tax return or the IRS can deposit your refund directly into your bank account in less than 21 days from the time you file your tax return unless there are delays by the IRS. If you file a paper return through the U.S. Postal Service, you can receive a refund check directly from the IRS through the U.S. Postal Service in 6 to 8 weeks from the time the IRS receives your return or the IRS can deposit your refund directly into your bank account in 6 to 8 weeks from the time the IRS receives your return. However, if your return contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund no earlier than February 15, 2021.

You can file your tax return electronically, select the Refund Processing Service ("RPS") for an additional fee of $40.00 (the "RPS fee"), and have your federal income tax refund processed through a processor using banking services of a financial institution. The RPS allows your refund to be deposited into a bank account intended for one-time use at Civista Bank ("Bank") and deducts your TurboTax fees and other fees you authorize from your refund. The balance is delivered to you via the disbursement method you select. If you file your tax return electronically and select the RPS, the IRS will deposit your refund with Bank. Upon Bank's receipt of your refund, Santa Barbara Tax Products Group, LLC, a processor, will deduct and pay from your refund the RPS fee, any fees charged by TurboTax for the preparation and filing of your tax return and any other amounts authorized by you and disburse the balance of your refund proceeds to you. Unless there are delays by the IRS, refunds are received in less than 21 days from the time you file your tax return electronically. However, if your return contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund no earlier than February 15, 2021.

The RPS is not necessary to obtain your refund. If you have an existing bank account, you do not need to use the RPS, which requires the payment of a fee, in order to receive a direct deposit from the IRS. You may consult the IRS website (IRS.gov) for information about tax refund processing.

If you select the RPS, no prior debt you may owe to Bank will be deducted from your refund.

You can change your income tax withholdings which might result in you receiving additional funds throughout the year rather than waiting to receive these funds potentially in an income tax refund next year. Please consult your employer or tax advisor for additional details.

This Agreement requires all disputes to be resolved by way of binding arbitration.
The terms of the arbitration provision appear in Section 11.

Information regarding low-cost deposit accounts may be available at www.mymoney.gov .

The chart below shows the options for filing your tax return (e-file or paper return), the RPS product, refund disbursement options, estimated timing for obtaining your tax refund proceeds, and costs associated with the various options.

WHAT TYPE OF FILING METHOD?	**WHAT ARE YOUR DISBURSEMENT OPTIONS?**	**WHAT IS THE ESTIMATED TIME TO RECEIVE REFUND?**	**WHAT COSTS DO YOU INCUR IN ADDITION TO TAX PREPARATION FEES?**
PAPER RETURN No Refund Processing Service	IRS direct deposit to your personal bank account.	Approximately 6 to 8 weeks [2]	No additional cost.
	Check mailed by IRS to address on tax return.	Approximately 6 to 8 weeks [2]	
ELECTRONIC FILING (E-FILE) No Refund Processing Service	IRS direct deposit to your personal bank account.	Usually within 21 days [2]	No additional cost.
	Check mailed by IRS to address on tax return.	Approximately 21 to 28 days [2]	
ELECTRONIC FILING (E-FILE) Refund Processing Service	(a) Direct deposit to your personal bank account, or (b) Load to your debit card [1].	Usually within 21 days [2]	$40.00 [3]

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[1] You may incur additional charges from the issuer of the debit card if you select to have your tax refund loaded on a debit card. Bank is not affiliated with the issuer of the debit card.

[2] However, if your return contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund no earlier than February 15, 2021.

[3] This fee consists of an RPS Fee, a TurboTax fee and any fees for additional products and services purchased. See Section 4 of the Refund Processing Service Agreement for more details.

Questions? Call 877-908-7228

We need your consent to process with this payment option

This is an IRS requirement

The purpose of this agreement is to confirm that you are eligible for this payment option. By agreeing, you allow Intuit, the maker of TurboTax software, to verify that your refund is enough to cover total fees and applicable sales tax.

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at *complaints@tigta.treas.gov.*

To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

I authorize Intuit, the maker of TurboTax, to use the information provided in this 2020 return to determine whether a portion of the refund can be used to pay for tax preparation.

Sugarmaa	Dorjdagva
First Name	Last Name

Please type the date below:
04/11/2021
Date

Read and accept this Disclosure Consent

This is an IRS requirement

In order to finalize your request for this payment option, we need to send the following information to Civista Bank of Sandusky, OH (’BANK’) and to Santa Barbara Tax Products Group, LLC (’SBTPG’), the administrator and servicer of this payment option: your identifying information, your deposit information and your refund amount.

We transmit this information so that you may use this payment option. BANK and SBTPG will use your information in accordance with their applicable refund processing service agreement and privacy policy.

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature."

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at *complaints@tigta.treas.gov.*

To agree, enter your name and date in the boxes below and select the "I Agree" button on the bottom of the page.

I authorize Intuit, the maker of TurboTax, to disclose to BANK and SBTPG that portion of my 2020 tax return information that is necessary to enable BANK and SBTPG to process my refund.

Sign this agreement by entering your name:

Sugarmaa Dorjdagva

Please type the date below:

04/11/2021

Date

Form 1099-B Worksheet

► Keep for your records

2020

Name(s) Shown on Return: Sugarmaa Dorjdagva

Social Security No.: 183-51-4747

Name of reporting financial institution ► TD Ameritrade Clearing, Inc.

Acct Number . . . . ► 496877567 **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
1	1,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM		Check here if this summarizes multiple sales. . . . . ► ☐		
A	10/14/20	10/13/20	12,531.40	12,417.92	
2	1,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM		Check here if this summarizes multiple sales. . . . . ► ☐		
A	10/16/20	10/14/20	12,374.61	12,399.80	25.19
3	500.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM		Check here if this summarizes multiple sales. . . . . ► ☐		
A	10/21/20	10/21/20	6,351.31	6,336.55	
	See TQUICK		Check here if this summarizes multiple sales. . . . . ► ☐		

Sale#	Adjustment Amount	Adjustment Code(s)	Holding Period	Basis Reported to IRS?	Reported on Form 1099B?
1			S	Yes X No	Yes X No
2			S	Yes X No	Yes X No
3			S	Yes X No	Yes X No
				Yes No	Yes No

For interview use only (sale 1) X

For interview use only (sale 2) X

For interview use only (sale 3) X

For interview use only

Sale(s) missing info? ____

Sale Results for Form 8949

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	A	,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	12,531.	12,418.	BYPASS8949		113.	S
2	A	,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	12,375.	12,400.	W	25.	0.	S
3	A	500.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	6,351.	6,337.	BYPASS8949		14.	S
4	A	,400.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	17,693.	17,578.	BYPASS8949		115.	S
5	A	,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	12,675.	12,638.	BYPASS8949		37.	S
6	A	,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	50,557.	49,448.	BYPASS8949		1,109.	S
7	A	,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	38,431.	38,324.	W	968.	1,075.	S
		See RQUICK						

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.

8949 Box	**Proceeds**	**Cost Basis**	**Gain/(Loss)**	**Adjustment Amt**	**Adj Gain/(Loss)**	**Code(s)**
Box A	4,349,377.	4,326,080.	23,297.	17,564.	40,861.	W
Short term sales with cost basis reported to the IRS						
Totals	4,349,377.	4,326,080.	23,297.	17,564.	40,861.	

Total Federal Backup Withholding . . . .

State ID

State Backup Witholding . . . .

Total State Backup Withholding . . . .

Total Collectible Gain . . . .

Qualified Small Business (QSB) gain (Sec 1202)

	Total Gain	Excluded Gain	Net Gain
Maximum 50% exclusion gain . . . . ►			
Maximum 60% exclusion gain . . . . ►			
Maximum 75% exclusion gain . . . . ►			
Maximum 100% exclusion gain . . . . ►			

PDF Attachment

Taxpayer must mail in a statement with more details?. . . . . ☐ Yes ☒ No

If yes, you'll need to submit a copy of your 1099-B to the IRS to provide documentation for some of the transactions on your sales summary.

Tax Payments Worksheet

2020

► Keep for your records

Name(s) Shown on Return: Sugarmaa Dorjdagva

Social Security Number: 183-51-4747

Estimated Tax Payments for 2020 (If more than 4 payments for any state or locality, see Tax Help)

	Federal		State			Local		
	Date	**Amount**	**Date**	**Amount**	**ID**	**Date**	**Amount**	**ID**
1	07/15/20		07/15/20			07/15/20		
2	07/15/20		07/15/20			07/15/20		
3	09/15/20		09/15/20			09/15/20		
4	01/15/21		01/15/21			01/15/21		
5								
Tot Estimated Payments . . .								

Tax Payments Other Than Withholding (If multiple states, see Tax Help)	**Federal**	**State**	**ID**	**Local**	**ID**
6 Overpayments applied to 2020	0.				
7 Credited by estates and trusts					
8 **Totals** Lines 1 through 7	0.				
9 2020 extensions					

Taxes Withheld From:					**Federal**	**State**	**Local**
10 Forms W-2							
11 Forms W-2G							
12 Forms 1099-R							
13 Forms 1099-MISC, 1099-NEC, 1099-K, 1099-G .					2,079.	1,043.	
14 Schedules K-1							
15 Forms 1099-INT, DIV and OID							
16 Social Security and Railroad Benefits							
17 Form 1099-B	St		Loc				
18 a Other withholding	St		Loc				
b Other withholding	St		Loc				
c Other withholding	St		Loc				
d Positive Adjustment . . .	St		Loc				
e Negative Adjustment . .	St		Loc				
f Additional Medicare Tax.							
19 **Total Withholding** Lines 10 through 18f					2,079.	1,043.	
20 **Total Tax Payments for 2020**					2,079.	1,043.	

Prior Year Taxes Paid In 2020 (If multiple states or localities, see Tax Help)	**State**	**ID**	**Local**	**ID**
21 Tax paid with 2019 extensions				
22 2019 estimated tax paid after 12/31/2019				
23 Balance due paid with 2019 return	304.	IL		
24 Other (amended returns, installment payments, etc) . .				

Federal Carryover Worksheet 2020

► Keep for your records

Name(s) Shown on Return: Sugarmaa Dorjdagva

Social Security Number: 183-51-4747

2019 State and Local Income Tax Information

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With-held/Pmts	(e) Paid With Return	(f) Total Over-payment	(g) Applied Amount
IL				304.		
Totals . .				304.		

2019 State Extension Information

(a) State	(b) Paid With Extension

2019 Locality Extension Information

(a) Locality	(b) Paid With Extension

2019 State Estimates Information

(a) State	(c) Estimates Paid After 12/31

2019 Locality Estimates Information

(a) Locality	(c) Estimates Paid After 12/31

2019 State Taxes Due Information

(a) State	(e) Paid With Return
IL	304.

2019 Locality Taxes Due Information

(a) Locality	(e) Paid With Return

2019 State Refund Applied Information

(a) State	(g) Applied Amount

2019 Locality Refund Applied Information

(a) Locality	(g) Applied Amount

2019 State Tax Refund Information

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment

2019 Locality Tax Refund Information

(a) Locality	(d) Total Withheld/Pmts	(f) Total Overpayment

Federal Carryover Worksheet page 2 **2020**

Sugarmaa Dorjdagva 183-51-4747

	Other Tax and Income Information		**2019**	**2020**
1	Filing status	**1**	4 HH	4 HH
2	Number of exemptions for blind or over 65 (0 - 4)	**2**		
3	Itemized deductions	**3**	0.	1,347.
4	Check box if required to itemize deductions	**4**	☐	☐
5	Adjusted gross income	**5**	10,687.	51,600.
6	Tax liability for Form 2210 or Form 2210-F	**6**	0.	1,675.
7	Alternative minimum tax	**7**		
8	Federal overpayment applied to next year estimated tax	**8**	0.	

QuickZoom to the IRA Information Worksheet for IRA information . . . . ►

	Excess Contributions		**2019**	**2020**
9 a	Taxpayer's excess Archer MSA contributions as of 12/31	**9 a**		
b	Spouse's excess Archer MSA contributions as of 12/31	**b**		
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31	**10 a**		
b	Spouse's excess Coverdell ESA contributions as of 12/31	**b**		
11 a	Taxpayer's excess HSA contributions as of 12/31	**11 a**		
b	Spouse's excess HSA contributions as of 12/31	**b**		

	Loss and Expense Carryovers Note**:** Enter all entries as a positive amount				**2019**	**2020**
12 a	Short-term capital loss			**12 a**		
b	AMT Short-term capital loss			**b**		
13 a	Long-term capital loss			**13 a**		
b	AMT Long-term capital loss			**b**		
14 a	Net operating loss available to carry forward			**14 a**		
b	AMT Net operating loss available to carry forward			**b**		
15 a	Investment interest expense disallowed			**15 a**		
b	AMT Investment interest expense disallowed			**b**		
16	Nonrecaptured net Section 1231 losses from:	**a**	2020	**16 a**		
		b	2019	**b**		
		c	2018	**c**		
		d	2017	**d**		
		e	2016	**e**		
		f	2015	**f**		
17	AMT Nonrecap'd net Sec 1231 losses from:	**a**	2020	**17 a**		
		b	2019	**b**		
		c	2018	**c**		
		d	2017	**d**		
		e	2016	**e**		
		f	2015	**f**		

Federal Carryover Worksheet page 3 2020

Sugarmaa Dorjdagva 183-51-4747

Credit Carryovers				**2019**	**2020**
18	General business credit		**18**		
19	Adoption credit from:	**a** 2020	**19 a**		
		b 2019	**b**		
		c 2018	**c**		
		d 2017	**d**		
		e 2016	**e**		
		f 2015	**f**		
20	Mortgage interest credit from:	**a** 2020	**20 a**		
		b 2019	**b**		
		c 2018	**c**		
		d 2017	**d**		
21	Credit for prior year minimum tax		**21**		
22	District of Columbia first-time homebuyer credit		**22**		
23	Residential energy efficient property credit		**23**		

Other Carryovers				**2019**	**2020**
24	Section 179 expense deduction disallowed		**24**		
25	Excess foreign housing deduction:	**a** Taxpayer (Form 2555, line 46)	**25 a**		
		b Taxpayer (Form 2555, line 48)	**b**		
		c Spouse (Form 2555, line 46)	**c**		
		d Spouse (Form 2555, line 48)	**d**		

Charitable Contribution Carryovers

26 **2019** Carryover of charitable contributions from:	**Other Property**		**Capital Gain**		**Cash**
	(a) 50%	**(b)** 30%	**(c)** 30%	**(d)** 20%	**(e)** 60/100%
a 2019					
b 2018					
c 2017					
d 2016					
e 2015					

27 **2020** Carryover of charitable contributions from:	**Other Property**		**Capital Gain**		**Cash**
	(a) 50%	**(b)** 30%	**(c)** 30%	**(d)** 20%	**(e)** 60/100%
a 2020					
b 2019					
c 2018					
d 2017					
e 2016					

28 Amount overpaid less earned income credit . . . . 0.

Qualified Business Income Deduction (Section 199A) carryovers					**2019**	**2020**
29	Qualified business loss carryforward		**29**			
30	Qualified PTP loss carryforward		**30**			
31	Applicable percentage	2018	**31 a**			
		2019	**b**	100.00		

2019 State Capital Loss Carryovers (For users **not** transferring from the prior year)

State ID	**Short-term Capital Loss for State**	**AMT Short-term Capital Loss for State**	**Long-term Capital Loss for State**	**AMT Long-term Capital Loss for State**	**Capital Loss (combined) for State**	**AMT Capital Loss (combined) for State**

CUSTOMER SERVICE: 877-908-7228

Santa Barbara Tax Products Group, LLC and Civista Bank Refund Processing Service Agreement ("Agreement")

Name: Sugarmaa Dorjdagva

Social Security No.: 183-51-4747

This Agreement contains important terms, conditions and disclosures about the processing of your refund (the "Refund Processing Service") by Santa Barbara Tax Products Group, LLC ("Processor"), a third party processor using banking services of Civista Bank ("Bank"). Read this Agreement carefully before accepting its terms and conditions, and print a copy and/or retain this information electronically for future reference. As used in this Agreement, the words "you" and "your" refer to the applicant or both the applicant and joint applicant if the 2020 federal income tax return is a joint return (individually and collectively, "Applicant"). The words "we," "us" and "our" refer to Bank and Processor.

1. **NOTICE: No Requirement To Use the Refund Processing Service In Order To File Electronically.**
YOU UNDERSTAND THAT A REFUND PROCESSING FEE OF $40.00 ("REFUND PROCESSING FEE") IS CHARGED BY PROCESSOR TO ESTABLISH A TEMPORARY ACCOUNT TO RECEIVE YOUR FEDERAL TAX REFUND, TO PROCESS IT, TO DEDUCT YOUR TURBOTAX FEES, AND OTHER AUTHORIZED FEES FROM THAT ACCOUNT, AND TO FORWARD FUNDS TO YOU. THE REFUND PROCESSING FEE IS NOT A LOAN; IT IS DUE TO PROCESSOR WHETHER OR NOT THE FEDERAL TAX REFUND OCCURS BUT PROCESSOR WILL NOT PURSUE COLLECTION OF THE REFUND PROCESSING FEE IF YOUR FEDERAL TAX REFUND DOES NOT OCCUR. THIS FEE IS COLLECTED ONLY AT THE TIME THE REFUND OCCURS. YOU CAN AVOID THIS FEE AND NOT USE THE REFUND PROCESSING SERVICE BY INSTEAD PAYING THE APPLICABLE TURBOTAX FEES TO INTUIT INC. BY CREDIT OR DEBIT CARD AT THE TIME YOU FILE YOUR 2020 FEDERAL INCOME TAX RETURN AND ELECTING TO HAVE YOUR REFUND DIRECTLY DEPOSITED IN YOUR OWN BANK ACCOUNT OR MAILED TO YOU. IF YOU DO USE THE REFUND PROCESSING SERVICE, YOU CAN EXPECT TO RECEIVE THE PROCEEDS FROM YOUR FEDERAL TAX REFUND WITHIN 21 DAYS FROM WHEN THE INTERNAL REVENUE SERVICE ("IRS") ACCEPTS YOUR RETURN UNLESS THERE ARE PROCESSING DELAYS BY THE IRS (OR UNLESS YOUR RETURN CONTAINS EARNED INCOME TAX CREDIT OR ADDITIONAL CHILD TAX CREDIT, IN WHICH CASE THE IRS WILL ISSUE YOUR REFUND NO EARLIER THAN FEBRUARY 15, 2021). THE REFUND PROCESSING SERVICE WILL NEITHER SPEED UP NOR DELAY YOUR FEDERAL TAX REFUND. THE COST OF PREPARING YOUR TAX RETURN IS NOT ANY MORE OR LESS IF YOU PURCHASE THE REFUND PROCESSING SERVICE.

2. Authorization to Release Personal Information. You authorize the IRS to disclose any information to Bank and Processor related to the funding of your 2020 federal tax refund. You also authorize Intuit Inc., as the transmitter of your electronically filed tax return, to disclose your tax return and contact information to Bank and Processor for use in connection with the Refund Processing Service being provided pursuant to this Agreement and Bank and Processor to share your information with Intuit Inc. You also represent that any authorizations you have made in this Section 2 have also been obtained from and are made with respect to your spouse, if this is a jointly filed return. None of Intuit Inc., Bank or Processor will disclose or use your tax return information for any other purpose, except as permitted by law. Bank and Processor will not use your tax information or contact information for any marketing purpose. Please see the Privacy Policy at the end of this Agreement describing how Bank may use or share your personal information.

3. Summary of Terms

Expected Federal Refund	$ 404.00
Less Processor Refund Processing Fee	$ 40.00
Less TurboTax Fees	$ 25.00
Less Fees for Additional Products and Services Purchased	$
Expected Proceeds*	$ 339.00

* These charges are itemized. This is only an estimate. The amount will be reduced by any applicable sales taxes, and if applicable, a Return Item Fee and an Account Research and Processing Fee paid to Processor as set forth in Sections 4, 6 and 7 below.

4. Temporary Deposit Account Authorization. You hereby authorize Bank to establish a temporary deposit account ("Deposit Account") for the purpose of receiving your tax year 2020 federal tax refund from the IRS. Bank or Processor must receive an acknowledgement from the IRS that your return has been electronically filed and accepted for processing before the Deposit Account can be opened. You authorize Processor to deduct from your Deposit Account the following amounts: (i) the Refund Processing Fee; (ii) the fees and charges related to the preparation, processing and transmission of your tax return ("TurboTax Fees"); and (iii) fees for Additional Products and Services Purchased, plus applicable taxes. You also authorize Processor

to deduct thirty dollars ($30.00) as a returned item processing fee (the "Return Item Fee") from your Deposit Account for the additional processing required in the event that your deposit is returned or cannot be delivered as directed in Section 7 below. A fee of $30.00 (the "Account Research and Processing Fee") may be charged if we are required to provide additional processing to return the funds to the IRS. These fees will be deducted from the Deposit Account and will be retained by Processor. You authorize Processor to disburse the balance of the Deposit Account to you after making all authorized deductions or payments. If the Deposit Account does not have sufficient funds to pay the TurboTax Fees and the fees for Additional Products and Services Purchased as set forth in Section 3, (a) you authorize Processor to automatically deduct such fees (or any portion thereof) via ACH, electronic check, or wire transfer directly from the account into which you authorized Processor to deposit your expected proceeds as set forth in Section 7, and (b) if you made alternative arrangements with TurboTax for payment of such fees, those arrangements will be attempted prior to any automatic deduction.

5. Acknowledgements. (a) You understand that: (i) neither Bank nor Processor can guarantee the amount of your tax year 2020 federal tax refund or the date it will be issued, and (ii) neither Bank nor Processor is affiliated with the transmitter of the tax return (Intuit Inc.) and neither warrants the accuracy of the software used to prepare the tax return. (b) You agree that Intuit Inc. is not acting as your agent and is not under any fiduciary duty with respect to the processing of your refund by Bank and Processor. (c) Your refund may be held or returned to the IRS if it is suspected of fraud or identity theft.

6. Truth in Savings Disclosure. The Deposit Account is being opened for the purpose of receiving your (or both spouses if this is a jointly filed return) tax year 2020 federal tax refund. Processor and Bank will deduct from the Deposit Account the fees set forth in Section 3, including the $ 40.00 Refund Processing Fee for opening and maintaining the Deposit Account and processing your tax refund. No other deposits may be made to the Deposit Account. No withdrawals will be allowed from the Deposit Account except to collect the fees stated in this Section, Section 3, Section 7, and as provided in Section 4. No interest is payable on the deposit; thus, the annual percentage yield and interest rate are 0%. The Deposit Account will be closed after all authorized deductions have been made and any remaining balance has been disbursed to you. We will also charge a Return Item Fee of $30.00 if the refund cannot be delivered as directed in Section 7 of this Agreement. A $30.00 Account Research and Processing Fee may be charged if we are required to provide additional processing to return the funds to the IRS. These fees will be deducted from the Deposit Account and will be retained by Processor. Questions or concerns about the Deposit Account should be directed to Santa Barbara Tax Products Group, LLC, 11085 North Torrey Pines Road, Suite 210, La Jolla, CA 92037 or via the Internet at http://sbtpg.com.

7. Disbursement Methods (Select One): You agree that the disbursement method selected below will be used by Processor to disburse funds to you.

a) ☐ Direct Deposit to Turbo(SM) Debit Visa(R) Card: If you choose this option, you authorize and request Processor to transfer the balance of your Deposit Account to Green Dot Bank, which issues the Turbo(SM) Debit Visa Card ("Card") you have obtained or are obtaining, so that Green Dot Bank may deposit the balance of your refund into your Card account. **Additional fees may be charged for the use of the Card. Please review the Deposit Account Agreement associated with the use of your Card to learn of other fees, charges, terms and conditions that will apply. Neither Bank nor Processor will be responsible for your funds once they have been deposited with Green Dot Bank.**

b) ☒ Direct Deposit to Checking or Savings Account: If you choose this option, the balance of your Deposit Account will be disbursed to you electronically by ACH direct deposit to your personal bank account designated below. If a joint return is filed, the bank account may be a joint account or the individual account of either spouse.

DIRECT DEPOSIT ACCOUNT TYPE:
☒ Checking
☐ Savings

RTN # 125008547
Account # 8378116845

Note: To ensure that there are no delays in receiving your refund, please contact your financial institution to confirm that you are using the correct RTN (routing) and account number. If you or your representative enter your account information incorrectly and your deposit is returned to Bank, the Deposit Account balance minus a $30.00 Return Item Fee will be disbursed to you via a cashier's check mailed to your physical address of record. Bank, Processor and Intuit Inc. are **not** responsible for the misapplication of a direct deposit that results from error, negligence or malfeasance on the part of you or your representative. In cases where Bank has received your federal tax refund but is unable to deliver the funds directly to you, funds may be held at Bank until claimed, or returned to the IRS. An Account Research and Processing Fee of $30.00 may be charged if we are required to provide additional processing to return the funds to the IRS. Return Item and Account Research and Processing Fees will not exceed $60.00 in the aggregate, and will be deducted from the Deposit Account for federal tax refunds that continue to be undeliverable and unclaimed and must be returned to the IRS. These fees will be retained by Processor. Due to the risk of fraudulent diversion of tax refunds, we will not process any address or account changes for purposes of disbursing your tax refund. If we become aware that your address or checking or savings account has changed after you sign this Agreement but before your federal tax refund is received by us, upon receipt of your federal tax refund from the IRS we will return your tax refund to the IRS after deducting our Refund Processing Fee, TurboTax Fees and other applicable fees. We will do our best to escalate the return of your federal tax refund to the IRS and you will need to work with the IRS directly for disbursement.

You must notify Processor in writing 3 business days prior to the date the account will be debited (as set forth in the email and/or written notices sent to you) to revoke the authorization for applicable fees agreed to in Section 4, and to afford Processor a reasonable opportunity to act on your request. You may notify us in writing at: Santa Barbara Tax Products Group, LLC, 11085 North Torrey Pines Road, Suite 210, La Jolla, California 92037.

8. FEDERAL ELECTRONIC FUND TRANSFER ACT DISCLOSURES: In case of errors or questions about electronic transfers to or from the Deposit Account, write to Santa Barbara Tax Products Group, LLC, 11085 North Torrey Pines Road, Suite 210, La Jolla, California 92037 or telephone (877) 908-7228 and provide your name, a description or explanation of the error, and the dollar amount of the suspected error. We will determine whether an error occurred within 10 business days after we hear from you and will correct any error promptly. If we need more time, however, we may take up to 45 business days to investigate your complaint or question. If we decide to do this, we will credit your Deposit Account within 10 business days for the amount you think is in error, although in most circumstances you won’t have use of the money until we complete our investigation. If we ask you to put your complaint or question in writing and we do not receive it within 10 business days, we may not credit your Deposit Account. For errors involving transfers of funds to or from the Deposit Account within 30 business days after the first deposit to the Deposit Account was made, (i) we may take up to 90 business days to investigate your complaint or question, and (ii) we may take up to 20 business days to credit your Deposit Account for the amount you think is in error. We will tell you the results within three business days after completing our investigation. If we decide that there was no error, we will send you a written explanation. You may ask for copies of the documents that we used in our investigation.

Business Days: Our business days are Monday through Friday, excluding federal holidays. Saturday, Sunday, and federal holidays are not considered business days, even if we are open.

Confidentiality: We will disclose information to third parties about your account or the transfers you make:

- To complete transfers as necessary;
- To verify the existence and condition of your account upon the request of a third party, such as a credit bureau or merchant;
- To comply with government agency or court orders;
- If you give us your written permission; or
- As explained in the Privacy Policy following this Agreement.

Our Liability: If we do not complete a transfer to your account on time or in the correct amount according to this Agreement, we may be liable for your losses or damages. In addition to all other limitations of liability set forth in this Agreement, we will not be liable to you if, among other things:

- Circumstances beyond our control (natural disasters, such as fire or flood) prevent the transfer, despite reasonable precautions that have been taken.
- The funds in your account are subject to legal process or other claim restricting such transfer.
- You or your representative provide us with inaccurate information.

9. Compensation. In addition to any fees paid directly by you to Intuit Inc., Processor will pay compensation to Intuit Inc. in consideration of Intuit Inc.’s provision of various programming, testing, data processing, transmission, systems maintenance, status reporting and other software, technical and communications services. The Refund Processing Fee will be retained by Processor for its Refund Processing Service. Processor shall pay Bank for its banking services.

10. Governing Law. The enforcement and interpretation of this Agreement and the transactions contemplated herein shall be governed by the laws of the United States, including the Electronic Signatures in Global and National Commerce Act, and, to the extent state law applies, the substantive laws of Ohio.

11. Arbitration Provision. **You acknowledge that the services set forth in this Agreement are being made available and priced by Processor on the basis of your acceptance of the following arbitration provision ("Arbitration Provision"). By entering into this Agreement, you acknowledge that you are giving up the right to litigate Claims (as defined below) if you, Bank or Processor elects arbitration of the Claims pursuant to this provision, except as otherwise expressly provided herein, and you hereby knowingly and voluntarily waive the right to trial of all Claims subject to this Agreement. You further acknowledge that you have read this Arbitration Provision carefully, agree to its terms, and are entering into this Agreement voluntarily and not in reliance on any promises or representations whatsoever except those contained in this Agreement.**

ARBITRATION NOTICE

THIS AGREEMENT CONTAINS AN ARBITRATION PROVISION. PLEASE READ THIS PROVISION CAREFULLY, AS IT AFFECTS YOUR LEGAL RIGHTS.

11.1. Arbitration of Claims: Except as expressly provided herein, any claim, dispute or controversy (whether based upon contract; tort, intentional or otherwise; constitution; statute; common law; or equity and whether pre-existing, present or future), including initial claims, counter-claims, cross-claims and third-party claims, arising from or relating directly or indirectly to this Agreement, including the validity, enforceability, interpretation, scope, or application of the Agreement and this Arbitration Provision (except for the prohibition on class or other non-individual claims, which shall be for a court to decide) ("Claim") shall be decided, upon the election of you, Bank or Processor (or our agents, employees, successors, representatives, affiliated companies, or assigns), by binding arbitration before the American Arbitration Association ("AAA"). Arbitration replaces the right to litigate a claim in court or to have a jury trial. The AAA's phone number is 800-778-7879 and website is http://www.adr.org. You may obtain copies of the current rules, forms, and instructions for initiating an arbitration using the above information.

11.2. Other Claims Subject to Arbitration: In addition to Claims brought by you, Claims made by anyone connected with you or anyone making a Claim through you (including a taxpayer filing jointly, employee, agent, representative, affiliated company, predecessor or successor, heir, assignee, or trustee in bankruptcy) against us shall be subject to arbitration as described herein.

11.3. Exceptions: We agree not to invoke our right to arbitrate any individual Claim you bring in small claims court or an equivalent court so long as the Claim is pending only in that court. This Arbitration Provision also does not limit or constrain our right to interplead funds in the event of claims to the Account by several parties.

11.4. Individual Claims Only: Claims may be submitted to arbitration on an individual basis only. Claims subject to this Arbitration Provision may not be joined or consolidated in arbitration with any Claim of any other person or be arbitrated on a class basis, in a representative capacity on behalf of the general public or on behalf of any other person, unless otherwise agreed to by the parties in writing. However, taxpayers filing jointly and party to this Agreement are considered as one person; Processor and its officers, directors, employees, agents, and affiliates are considered as one person; and Bank and its officers, directors, employees, agents, and affiliates are considered as one person.

11.5. Arbitration Fees: If you initiate arbitration, we will advance any arbitration fees, including any required deposit. If we initiate or elect arbitration, we will pay the entire amount of the arbitration fees, including any required deposit. We will also be responsible for payment and/or reimbursement of any arbitration fees to the extent that such fees exceed the amount of the filing fees you would have incurred if your Claim had been brought in the state or federal court nearest your residence with jurisdiction over the Claims.

11.6. Procedure: A single arbitrator will resolve the Claims. The arbitrator will be a lawyer with at least ten years' experience or who is a former or retired judge. The arbitration shall follow the rules and procedures of the arbitration administrator in effect on the date the arbitration is filed, except when there is a conflict or inconsistency between the rules and procedures of the arbitration administrator and this Arbitration Provision, in which case this Arbitration Provision shall govern. Any in-person arbitration hearing for a Claim shall take place within the federal judicial district in which you live or at such other reasonably convenient location as agreed by the parties. The arbitrator shall apply applicable substantive law consistent with the Federal Arbitration Act, 9 U.S.C. § 1 et seq. (the "FAA") and shall honor all claims of privilege and confidentiality recognized at law. All statutes of limitations that would otherwise be applicable shall apply to any arbitration proceeding. The arbitrator shall be empowered to grant whatever relief would be available in court under law or in equity. Any appropriate court may enter judgment upon the arbitrator's award. This Arbitration Provision is made pursuant to a transaction involving interstate commerce, and shall be governed by the FAA.

12. Customer Identity Validation Disclosure. To help Bank, Processor and the government identify and fight tax refund fraud, as well as fight the funding of terrorism and money laundering activities, Bank and Processor obtain, verify, and record information that identifies each Refund Processing Service client. What this means for you: When you apply to use the Refund Processing Service for the purpose of receiving your federal tax refund, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver’s license or other identifying documents if we need to perform additional due diligence on your account.

YOUR AGREEMENT

Bank and Processor agree to all of the terms of this Agreement. By selecting the "I Agree" button in TurboTax: (i) You authorize Bank to receive your 2020 federal tax refund from the IRS and Processor to make the deductions from your refund described in the Agreement, (ii) You agree to receive all communications electronically in accordance with the "Communications" section of the Tax Year 2020 TurboTax(R) User Agreement, (iii) You consent to the release of your 2020 federal tax refund deposit information and application information as described in Section 2 of this Agreement; and (iv) You acknowledge that you have reviewed, and agree to be bound by, the Agreement’s terms and conditions. If this is a joint return, selecting "I Agree" indicates that both spouses agree to be bound by the terms and conditions of the Agreement.

Rev. 02/2015

Civista Bank Tax Product Privacy Policy

FACTS What does Civista Bank do with your Personal Information?

Why?

Financial Companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.

What?

The types of personal information that we collect and share depend on the product or service you have with us. This can include:

- Social Security number and account balances
- payment history and transaction history
- overdraft history and account transactions

When you are no longer our customer, we continue to share your information as described in this notice.

How?

All Financial Companies need to share customers' personal information to run their everyday business. In the section below we list the reasons financial companies can share their customers' personal information; the reasons Civista Bank chooses to share and whether you can limit the sharing.

Reasons we can share your personal information	Does Civista Bank Share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transaction, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.	Yes	No
For our marketing purposes — to offer our products and services to you.	No	We don't share
For joint marketing with other financial companies.	No	We don't share
For our affiliates' everyday business purposes — information about your transactions and experiences.	No	We don't share
For our affiliates' everyday business purposes — information about your creditworthiness.	No	We don't share
For our affiliates to market to you.	No	We don't share
For non affiliates to market to you.	No	We don't share

Questions? Call Toll Free: 800-901-6663 or go to www.civistabank.com

Who we are	
Who is providing this notice?	Civista Bank
What we do	
How does Civista Bank protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Civista Bank collect my personal information?	We collect personal information about you when you apply for a tax related product. This includes information in your application, such as your name, address, social security number, income, deductions, refund and the like. We also collect information about your transactions with us, tax preparers and similar providers, such as payment histories, balances due, and tax information. We may also collect information concerning your credit history from a consumer reporting agency.
Why can’t I limit all sharing?	Federal law gives you the right to limit only: ● Sharing for affiliates everyday business purposes – information about your creditworthiness, ● Affiliates from using your information to market to you, ● Sharing for non affiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ● Civista Bank does not share with our affiliates.
Non affiliates	Companies not related by common ownership or control. They can be financial or nonfinancial companies. ● Civista Bank does not share with non affiliates so they can market to you.
Joint Marketing	A formal joint marketing agreement between non affiliated financial companies that together market financial products or services to you. ● Civista Bank does not jointly market.
Other Important Information	
This Notice is adopted in recognition of our obligations under Title V of Gramm-Leach Bliley Act of 1999.	
This Notice applies only to individuals who have applied for a tax-related bank product.	

ELECTRONIC POSTMARK - CERTIFICATION OF ELECTRONIC FILING

Taxpayer: Sugarmaa Dorjdagva
Primary SSN: 183-51-4747

Federal Return Submitted: April 11, 2021 10:49 AM PDT
Federal Return Acceptance Date: ___________

Your return was electronically transmitted on 04/11/2021

The Intuit Electronic Postmark shows the date and time Intuit received your federal tax return. The Intuit Electronic Postmark documents the filing date of your income tax return, and the electronic postmark information should be kept on file with your tax return and other tax-related documentation.

There are two important aspects of the Intuit Electronic Postmark:

1. THE INTUIT ELECTRONIC POSTMARK.
The electronic postmark shows the date and time Intuit received the federal return, and is deemed the filing date if the date of the electronic postmark is on or before the date prescribed for filing of the federal individual income tax return.

TIMELY FILING:
For your federal return to be considered filed on time, your return must be postmarked on or before midnight May 17, 2021. Intuit's electronic postmark is issued in the Pacific Time (PT) zone. If you are not filing in the PT zone, you will need to add or subtract hours from the Intuit Electronic Postmark time to determine your local postmark time. For example, if you are filing in the Eastern Time (ET) zone and you electronically file your return at 9 AM on May 17, 2021, your Intuit electronic postmark will indicate May 17, 2021, 6 AM. If your federal tax return is rejected, the IRS still considers it filed on time if the electronic postmark is on or before May 17, 2021, and a corrected return is submitted and accepted before May 22, 2021. If your return is submitted after May 22, 2021, a new time stamp is issued to reflect that your return was submitted after the IRS deadline and, consequently, is no longer considered to have been filed on time.

If you request an automatic six-month extension, your return must be electronically postmarked by midnight October 15, 2021. If your federal tax return is rejected, the IRS will still consider it filed on time if the electronic postmark is on or before October 15, 2021, and the corrected return is submitted and accepted by October 20, 2021.

2. THE ACCEPTANCE DATE.
Once the IRS accepts the electronically filed return, the acceptance date will be provided by the Intuit Electronic Filing Center. This date is proof that the IRS accepted the electronically filed return.

Additional information from your 2020 Federal Tax Return

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

4	1,400.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	10/22/20	10/22/20	17,693.34	17,578.03		
		S	Yes X	No	Yes X	No
For interview use only						X
5	1,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	10/23/20	10/23/20	12,674.61	12,638.29		
		S	Yes X	No	Yes X	No
For interview use only						X
6	3,800.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/09/20	Various	50,557.34	49,447.88		
		S	Yes X	No	Yes X	No
For interview use only						X
7	3,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/16/20	Various	38,430.59	38,324.14	968.14	
		S	Yes X	No	Yes X	No
For interview use only						X
8	2,300.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/18/20	Various	30,460.05	30,694.79	369.53	
		S	Yes X	No	Yes X	No
For interview use only						X
9	7,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/23/20	Various	90,586.69	90,596.38	690.85	
		S	Yes X	No	Yes X	No
For interview use only						X
10	5,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/24/20	Various	71,777.83	71,118.49	209.78	
		S	Yes X	No	Yes X	No
For interview use only						X
11	3,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/27/20	11/24/20	46,438.61	44,512.50		
		S	Yes X	No	Yes X	No
For interview use only						X

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

12	10,500.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/03/20	Various	167,088.00	164,707.60		
		S	Yes X	No	Yes X	No
For interview use only						X
13	11,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/04/20	Various	181,054.70	180,168.62	89.67	
		S	Yes X	No	Yes X	No
For interview use only						X
14	14,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/07/20	Various	237,973.08	237,270.02	1,117.45	
		S	Yes X	No	Yes X	No
For interview use only						X
15	2,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/08/20	12/07/20	35,738.97	35,699.80		
		S	Yes X	No	Yes X	No
For interview use only						X
16	2,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/09/20	12/09/20	36,998.94	36,720.40		
		S	Yes X	No	Yes X	No
For interview use only						X
17	3,791.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/10/20	Various	69,828.24	67,715.94		
		S	Yes X	No	Yes X	No
For interview use only						X
18	157.00sh of 037833100 APPLE INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	03/13/20	Various	43,169.97	41,071.20		
		S	Yes X	No	Yes X	No
For interview use only						X
19	150.00sh of 037833100 APPLE INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	03/18/20	03/18/20	36,743.92	36,658.49		
		S	Yes X	No	Yes X	No
For interview use only						X
20	5,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	Check here if this summarizes multiple sales . . . . ► ☐				
A	03/17/20	03/17/20	35,048.63	32,500.00		
		S	Yes X	No	Yes X	No
For interview use only						X

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

21	1,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	Check here if this summarizes multiple sales . . . . ► ☐					
A	03/18/20	03/18/20	14,618.61	14,419.80			
		S	Yes X		No	Yes X	No
For interview							X
use only							
22	2,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	Check here if this summarizes multiple sales . . . . ► ☐					
A	03/19/20	03/19/20	47,998.70	46,717.13	597.78		
		S	Yes X		No	Yes X	No
For interview							X
use only							
23	2,995.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	Check here if this summarizes multiple sales . . . . ► ☐					
A	03/24/20	Various	33,576.97	61,503.05	4,429.11		
		S	Yes X		No	Yes X	No
For interview							X
use only							
24	168.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	03/25/20	03/24/20	25,428.86	20,122.72			
		S	Yes X		No	Yes X	No
For interview							X
use only							
25	200.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	03/31/20	03/31/20	30,459.31	30,438.56			
		S	Yes X		No	Yes X	No
For interview							X
use only							
26	200.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	04/07/20	03/31/20	32,199.27	30,145.40			
		S	Yes X		No	Yes X	No
For interview							X
use only							
27	400.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	04/09/20	Various	60,696.62	60,176.00			
		S	Yes X		No	Yes X	No
For interview							X
use only							
28	150.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	04/15/20	04/14/20	22,097.57	22,087.50			
		S	Yes X		No	Yes X	No
For interview							X
use only							
29	150.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	04/17/20	04/16/20	22,381.13	20,978.03			
		S	Yes X		No	Yes X	No
For interview							X
use only							

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

30	270.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	04/29/20	Various	37,508.98	38,238.30	1,909.18	
		S	Yes X	No	Yes X	No
For interview use only						X
31	100.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	05/26/20	05/01/20	14,499.67	14,659.90	160.23	
		S	Yes X	No	Yes X	No
For interview use only						X
32	100.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	05/29/20	05/29/20	14,789.16	14,564.23		
		S	Yes X	No	Yes X	No
For interview use only						X
33	100.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/01/20	06/01/20	14,769.94	14,589.00		
		S	Yes X	No	Yes X	No
For interview use only						X
34	300.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/08/20	06/08/20	68,704.45	67,968.00		
		S	Yes X	No	Yes X	No
For interview use only						X
35	400.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	12/03/20	Various	95,834.88	93,814.83	12.50	
		S	Yes X	No	Yes X	No
For interview use only						X
36	200.00sh of 097023105 BOEING CO COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	12/07/20	Various	48,359.05	47,902.00		
		S	Yes X	No	Yes X	No
For interview use only						X
37	420.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	04/17/20	04/17/20	10,193.19	10,126.16		
		S	Yes X	No	Yes X	No
For interview use only						X
38	880.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	04/21/20	04/21/20	20,539.55	20,251.90		
		S	Yes X	No	Yes X	No
For interview use only						X

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

39	600.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/29/20	04/29/20	15,599.59	15,516.00		
		S	Yes X	No	Yes X	No
For interview use only						X
40	400.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/30/20	04/30/20	10,719.71	10,653.96		
		S	Yes X	No	Yes X	No
For interview use only						X
41	400.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/01/20	05/01/20	9,935.73	9,962.10	26.37	
		S	Yes X	No	Yes X	No
For interview use only						X
42	800.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/26/20	05/01/20	19,599.47	19,546.21	24.34	
		S	Yes X	No	Yes X	No
For interview use only						X
43	3,600.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/27/20	05/27/20	95,061.47	95,207.94	1,264.78	
		S	Yes X	No	Yes X	No
For interview use only						X
44	600.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/28/20	05/28/20	15,581.65	15,699.54	176.77	
		S	Yes X	No	Yes X	No
For interview use only						X
45	800.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/01/20	05/28/20	20,759.52	20,432.77		
		S	Yes X	No	Yes X	No
For interview use only						X
46	800.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/02/20	06/01/20	21,311.45	20,878.70		
		S	Yes X	No	Yes X	No
For interview use only						X
47	1,200.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/03/20	06/02/20	32,411.13	31,830.96		
		S	Yes X	No	Yes X	No
For interview use only						X

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

48	2,000.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/04/20	06/04/20	60,308.43	59,939.09		
		S	Yes X	No	Yes X	No
For interview use only						X

49	800.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/05/20	06/05/20	29,131.25	28,655.92		
		S	Yes X	No	Yes X	No
For interview use only						X

50	400.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/08/20	06/05/20	14,479.63	14,078.00		
		S	Yes X	No	Yes X	No
For interview use only						X

51	1,000.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/09/20	06/08/20	36,889.06	36,890.00	0.94	
		S	Yes X	No	Yes X	No
For interview use only						X

52	300.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/10/20	11/10/20	11,033.72	11,016.28		
		S	Yes X	No	Yes X	No
For interview use only						X

53	683.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/16/20	11/16/20	25,770.80	25,603.47	13.09	
		S	Yes X	No	Yes X	No
For interview use only						X

54	250.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/17/20	11/17/20	9,319.76	9,226.57		
		S	Yes X	No	Yes X	No
For interview use only						X

55	600.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/18/20	11/18/20	23,227.43	23,119.37	2.19	
		S	Yes X	No	Yes X	No
For interview use only						X

56	300.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/19/20	11/19/20	11,322.16	11,322.00		
		S	Yes X	No	Yes X	No
For interview use only						X

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TQUICK **Continuation Statement**

57	300.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/20/20	11/19/20	11,368.98	11,352.00		
		S	Yes X	No	Yes X	No
For interview use only						X
58	600.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	11/23/20	Various	22,748.93	22,676.97		
		S	Yes X	No	Yes X	No
For interview use only						X
59	500.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/02/20	12/02/20	19,981.52	19,801.50		
		S	Yes X	No	Yes X	No
For interview use only						X
60	300.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/07/20	12/07/20	12,758.69	12,779.97	21.28	
		S	Yes X	No	Yes X	No
For interview use only						X
61	400.00sh of 247361702 DELTA AIR LINES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/10/20	12/10/20	16,702.59	16,714.78	13.30	
		S	Yes X	No	Yes X	No
For interview use only						X
62	110.00sh of 55087P104 LYFT INC COM CL A	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/06/20	05/05/20	3,328.52	2,987.60		
		S	Yes X	No	Yes X	No
For interview use only						X
63	220.00sh of 594918104 MICROSOFT CORP COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	03/16/20	03/16/20	32,341.46	30,942.98		
		S	Yes X	No	Yes X	No
For interview use only						X
64	150.00sh of 844741108 SOUTHWEST AIRLINES CO COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/11/20	05/11/20	3,950.89	3,945.75		
		S	Yes X	No	Yes X	No
For interview use only						X
65	150.00sh of 844741108 SOUTHWEST AIRLINES CO COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/12/20	05/11/20	3,932.89	3,933.75		
		S	Yes X	No	Yes X	No
For interview use only						X

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TQUICK **Continuation Statement**

66	50.00sh of 852234103 SQUARE INC COM CL A	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/11/20	05/11/20	3,761.91	3,759.33		
		S	Yes X	No	Yes X	No
For interview use only					X	
67	1,900.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/18/20	Various	66,692.04	65,743.23	249.94	
		S	Yes X	No	Yes X	No
For interview use only					X	
68	1,800.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/21/20	Various	61,969.91	62,228.36	454.18	
		S	Yes X	No	Yes X	No
For interview use only					X	
69	1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/22/20	Various	41,701.34	41,295.18		
		S	Yes X	No	Yes X	No
For interview use only					X	
70	1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/27/20	Various	41,368.95	41,039.94	459.46	
		S	Yes X	No	Yes X	No
For interview use only					X	
71	600.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	05/28/20	05/28/20	20,978.47	21,105.46	126.99	
		S	Yes X	No	Yes X	No
For interview use only					X	
72	1,400.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/02/20	Various	50,299.72	49,977.53	10.54	
		S	Yes X	No	Yes X	No
For interview use only					X	
73	800.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/04/20	06/04/20	29,639.32	29,438.64		
		S	Yes X	No	Yes X	No
For interview use only					X	
74	1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	06/05/20	Various	45,100.68	44,492.00	144.38	
		S	Yes X	No	Yes X	No
For interview use only					X	

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TQUICK **Continuation Statement**

75	800.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	06/09/20	Various	29,631.26	29,908.38			
		S	Yes X		No	Yes X	No
For interview use only						X	

76	29.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	10/16/20	10/16/20	985.84	985.86	0.02		
		S	Yes X		No	Yes X	No
For interview use only						X	

77	300.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	10/19/20	10/16/20	10,280.74	10,213.52			
		S	Yes X		No	Yes X	No
For interview use only						X	

78	150.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	10/22/20	10/21/20	5,310.34	5,317.49	7.15		
		S	Yes X		No	Yes X	No
For interview use only						X	

79	665.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	11/06/20	11/06/20	29,957.51	29,932.15			
		S	Yes X		No	Yes X	No
For interview use only						X	

80	700.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	11/09/20	11/09/20	34,066.15	33,633.25			
		S	Yes X		No	Yes X	No
For interview use only						X	

81	213.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	11/11/20	11/11/20	10,058.12	9,953.47			
		S	Yes X		No	Yes X	No
For interview use only						X	

82	500.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	11/13/20	11/13/20	23,222.44	23,181.63	4.32		
		S	Yes X		No	Yes X	No
For interview use only						X	

83	200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐					
A	11/23/20	11/23/20	9,879.76	9,770.70			
		S	Yes X		No	Yes X	No
For interview use only						X	

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TQUICK **Continuation Statement**

84	300.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/02/20	11/24/20	15,623.64	15,415.10		
		S	Yes X	No	Yes X	No
For interview use only						X
85	600.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/03/20	12/03/20	31,776.23	31,691.64	53.39	
		S	Yes X	No	Yes X	No
For interview use only						X
86	200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	12/09/20	12/07/20	11,137.73	10,962.26		
		S	Yes X	No	Yes X	No
For interview use only						X
87	600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	03/25/20	03/24/20	22,721.49	20,640.00		
		S	Yes X	No	Yes X	No
For interview use only						X
88	1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/07/20	04/07/20	32,711.26	32,267.88		
		S	Yes X	No	Yes X	No
For interview use only						X
89	1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/08/20	04/07/20	30,719.18	30,180.00		
		S	Yes X	No	Yes X	No
For interview use only						X
90	1,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/09/20	04/09/20	32,279.17	32,149.90		
		S	Yes X	No	Yes X	No
For interview use only						X
91	1,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/14/20	04/13/20	32,549.15	32,250.00		
		S	Yes X	No	Yes X	No
For interview use only						X
92	3,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ► ☐				
A	04/17/20	Various	94,477.52	93,918.80		
		S	Yes X	No	Yes X	No
For interview use only						X

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

TQUICK **Continuation Statement**

93	1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	04/29/20	Various	45,918.80	45,336.00	520.60	
		S	Yes X	No	Yes X	No
For interview use only						X

94	1,100.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	05/26/20	Various	32,669.15	32,317.52	780.61	
		S	Yes X	No	Yes X	No
For interview use only						X

95	1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	05/28/20	05/28/20	35,180.08	36,266.53	1,212.15	
		S	Yes X	No	Yes X	No
For interview use only						X

96	1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/01/20	Various	47,614.76	47,161.23	425.54	
		S	Yes X	No	Yes X	No
For interview use only						X

97	800.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/03/20	06/03/20	24,979.35	25,033.38	239.79	
		S	Yes X	No	Yes X	No
For interview use only						X

98	3,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/05/20	06/05/20	130,751.89	127,459.69		
		S	Yes X	No	Yes X	No
For interview use only						X

99	1,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/08/20	06/05/20	46,008.86	43,940.00		
		S	Yes X	No	Yes X	No
For interview use only						X

100	932.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	06/09/20	06/09/20	40,327.85	39,964.16		
		S	Yes X	No	Yes X	No
For interview use only						X

101	1,721.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	Check here if this summarizes multiple sales . . . . ►	☐			
A	11/24/20	Various	76,351.68	75,038.33		
		S	Yes X	No	Yes X	No
For interview use only						X

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TQUICK **Continuation Statement**

102	1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM		Check here if this summarizes multiple sales . . . . ►	☐				
A	12/01/20	Various	73,210.71	72,747.36				
		S	Yes X		No	Yes X		No
For interview use only								X

103	2,857.00sh of 910047109 UNITED AIRLINES HOLDINGS COM		Check here if this summarizes multiple sales . . . . ►	☐				
A	12/02/20	Various	132,959.05	132,483.28				
		S	Yes X		No	Yes X		No
For interview use only								X

104	5,300.00sh of 910047109 UNITED AIRLINES HOLDINGS COM		Check here if this summarizes multiple sales . . . . ►	☐				
A	12/03/20	Various	260,667.48	259,432.63	206.33			
		S	Yes X		No	Yes X		No
For interview use only								X

105	1,500.00sh of 910047109 UNITED AIRLINES HOLDINGS COM		Check here if this summarizes multiple sales . . . . ►	☐				
A	12/04/20	Various	75,932.20	75,234.55	62.66			
		S	Yes X		No	Yes X		No
For interview use only								X

106	1,400.00sh of 910047109 UNITED AIRLINES HOLDINGS COM		Check here if this summarizes multiple sales . . . . ►	☐				
A	12/08/20	Various	70,152.28	70,220.16	483.52			
		S	Yes X		No	Yes X		No
For interview use only								X

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

RQUICK **Continuation Statement**

8	A	2,300.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	30,460.	30,695.	W	370.	135.	S
9	A	7,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	90,587.	90,596.	W	691.	682.	S
10	A	5,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	71,778.	71,118.	W	210.	870.	S
11	A	3,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	46,439.	44,513.	BYPASS8949		1,926.	S
12	A	10,500.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	167,088.	164,708.	BYPASS8949		2,380.	S
13	A	11,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	181,055.	180,169.	W	90.	976.	S
14	A	14,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	237,973.	237,270.	W	1,117.	1,820.	S
15	A	2,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	35,739.	35,700.	BYPASS8949		39.	S
16	A	2,000.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	36,999.	36,720.	BYPASS8949		279.	S
17	A	3,791.00sh of 02376R102 AMERICAN AIRLINES GROUP INC COM	69,828.	67,716.	BYPASS8949		2,112.	S
18	A	157.00sh of 037833100 APPLE INC COM	43,170.	41,071.	BYPASS8949		2,099.	S
19	A	150.00sh of 037833100 APPLE INC COM	36,744.	36,658.	BYPASS8949		86.	S
20	A	5,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	35,049.	32,500.	BYPASS8949		2,549.	S
21	A	1,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	14,619.	14,420.	BYPASS8949		199.	S
22	A	2,000.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	47,999.	46,717.	W	598.	1,880.	S
23	A	2,995.00sh of 09523Q200 BLUE APRON HOLDINGS INC COM CL A	33,577.	61,503.	W	4,429.	-23,497.	S
24	A	168.00sh of 097023105 BOEING CO COM	25,429.	20,123.	BYPASS8949		5,306.	S
25	A	200.00sh of 097023105 BOEING CO COM	30,459.	30,439.	BYPASS8949		20.	S
26	A	200.00sh of 097023105 BOEING CO COM	32,199.	30,145.	BYPASS8949		2,054.	S

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

RQUICK **Continuation Statement**

27	A	400.00sh of 097023105 BOEING CO COM	60,697.	60,176.	BYPASS8949		521.	S
28	A	150.00sh of 097023105 BOEING CO COM	22,098.	22,088.	BYPASS8949		10.	S
29	A	150.00sh of 097023105 BOEING CO COM	22,381.	20,978.	BYPASS8949		1,403.	S
30	A	270.00sh of 097023105 BOEING CO COM	37,509.	38,238.	W	1,909.	1,180.	S
31	A	100.00sh of 097023105 BOEING CO COM	14,500.	14,660.	W	160.	0.	S
32	A	100.00sh of 097023105 BOEING CO COM	14,789.	14,564.	BYPASS8949		225.	S
33	A	100.00sh of 097023105 BOEING CO COM	14,770.	14,589.	BYPASS8949		181.	S
34	A	300.00sh of 097023105 BOEING CO COM	68,704.	67,968.	BYPASS8949		736.	S
35	A	400.00sh of 097023105 BOEING CO COM	95,835.	93,815.	W	13.	2,033.	S
36	A	200.00sh of 097023105 BOEING CO COM	48,359.	47,902.	BYPASS8949		457.	S
37	A	420.00sh of 247361702 DELTA AIR LINES INC COM	10,193.	10,126.	BYPASS8949		67.	S
38	A	380.00sh of 247361702 DELTA AIR LINES INC COM	20,540.	20,252.	BYPASS8949		288.	S
39	A	600.00sh of 247361702 DELTA AIR LINES INC COM	15,600.	15,516.	BYPASS8949		84.	S
40	A	400.00sh of 247361702 DELTA AIR LINES INC COM	10,720.	10,654.	BYPASS8949		66.	S
41	A	400.00sh of 247361702 DELTA AIR LINES INC COM	9,936.	9,962.	W	26.	0.	S
42	A	300.00sh of 247361702 DELTA AIR LINES INC COM	19,599.	19,546.	W	24.	77.	S
43	A	3,600.00sh of 247361702 DELTA AIR LINES INC COM	95,061.	95,208.	W	1,265.	1,118.	S
44	A	600.00sh of 247361702 DELTA AIR LINES INC COM	15,582.	15,700.	W	177.	59.	S
45	A	300.00sh of 247361702 DELTA AIR LINES INC COM	20,760.	20,433.	BYPASS8949		327.	S
46	A	300.00sh of 247361702 DELTA AIR LINES INC COM	21,311.	20,879.	BYPASS8949		432.	S
47	A	1,200.00sh of 247361702 DELTA AIR LINES INC COM	32,411.	31,831.	BYPASS8949		580.	S
48	A	2,000.00sh of 247361702 DELTA AIR LINES INC COM	60,308.	59,939.	BYPASS8949		369.	S
49	A	300.00sh of 247361702 DELTA AIR LINES INC COM	29,131.	28,656.	BYPASS8949		475.	S
50	A	400.00sh of 247361702 DELTA AIR LINES INC COM	14,480.	14,078.	BYPASS8949		402.	S
51	A	1,000.00sh of 247361702 DELTA AIR LINES INC COM	36,889.	36,890.	W	1.	0.	S
52	A	300.00sh of 247361702 DELTA AIR LINES INC COM	11,034.	11,016.	BYPASS8949		18.	S
53	A	683.00sh of 247361702 DELTA AIR LINES INC COM	25,771.	25,603.	W	13.	181.	S
54	A	250.00sh of 247361702 DELTA AIR LINES INC COM	9,320.	9,227.	BYPASS8949		93.	S
55	A	600.00sh of 247361702 DELTA AIR LINES INC COM	23,227.	23,119.	W	2.	110.	S
56	A	300.00sh of 247361702 DELTA AIR LINES INC COM	11,322.	11,322.	BYPASS8949		0.	S
57	A	300.00sh of 247361702 DELTA AIR LINES INC COM	11,369.	11,352.	BYPASS8949		17.	S
58	A	600.00sh of 247361702 DELTA AIR LINES INC COM	22,749.	22,677.	BYPASS8949		72.	S
59	A	500.00sh of 247361702 DELTA AIR LINES INC COM	19,982.	19,802.	BYPASS8949		180.	S
60	A	300.00sh of 247361702 DELTA AIR LINES INC COM	12,759.	12,780.	W	21.	0.	S
61	A	400.00sh of 247361702 DELTA AIR LINES INC COM	16,703.	16,715.	W	13.	1.	S
62	A	110.00sh of 55087P104 LYFT INC COM CL A	3,329.	2,988.	BYPASS8949		341.	S
63	A	220.00sh of 594918104 MICROSOFT CORP COM	32,341.	30,943.	BYPASS8949		1,398.	S
64	A	150.00sh of 844741108 SOUTHWEST AIRLINES CO COM	3,951.	3,946.	BYPASS8949		5.	S
65	A	150.00sh of 844741108 SOUTHWEST AIRLINES CO COM	3,933.	3,934.	BYPASS8949		-1.	S
66	A	50.00sh of 852234103 SQUARE INC COM CL A	3,762.	3,759.	BYPASS8949		3.	S
67	A	1,900.00sh of 90353T100 UBER TECHNOLOGIES INC COM	66,692.	65,743.	W	250.	1,199.	S
68	A	1,800.00sh of 90353T100 UBER TECHNOLOGIES INC COM	61,970.	62,228.	W	454.	196.	S
69	A	1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	41,701.	41,295.	BYPASS8949		406.	S
70	A	1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	41,369.	41,040.	W	459.	788.	S
71	A	600.00sh of 90353T100 UBER TECHNOLOGIES INC COM	20,978.	21,105.	W	127.	0.	S
72	A	1,400.00sh of 90353T100 UBER TECHNOLOGIES INC COM	50,300.	49,978.	W	11.	333.	S
73	A	300.00sh of 90353T100 UBER TECHNOLOGIES INC COM	29,639.	29,439.	BYPASS8949		200.	S
74	A	1,200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	45,101.	44,492.	W	144.	753.	S
75	A	300.00sh of 90353T100 UBER TECHNOLOGIES INC COM	29,631.	29,908.	BYPASS8949		-277.	S
76	A	29.00sh of 90353T100 UBER TECHNOLOGIES INC COM	986.	986.	W	0.	0.	S
77	A	300.00sh of 90353T100 UBER TECHNOLOGIES INC COM	10,281.	10,214.	BYPASS8949		67.	S
78	A	150.00sh of 90353T100 UBER TECHNOLOGIES INC COM	5,310.	5,317.	W	7.	0.	S
79	A	665.00sh of 90353T100 UBER TECHNOLOGIES INC COM	29,958.	29,932.	BYPASS8949		26.	S
80	A	700.00sh of 90353T100 UBER TECHNOLOGIES INC COM	34,066.	33,633.	BYPASS8949		433.	S

Form 1099-B Worksheet (TD Ameritrade Clearing, Inc.)

RQUICK Continuation Statement

81	A	213.00sh of 90353T100 UBER TECHNOLOGIES INC COM	10,058.	9,953.	BYPASS8949		105.	S
82	A	500.00sh of 90353T100 UBER TECHNOLOGIES INC COM	23,222.	23,182.	W	4.	44.	S
83	A	200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	9,880.	9,771.	BYPASS8949		109.	S
84	A	300.00sh of 90353T100 UBER TECHNOLOGIES INC COM	15,624.	15,415.	BYPASS8949		209.	S
85	A	600.00sh of 90353T100 UBER TECHNOLOGIES INC COM	31,776.	31,692.	W	53.	137.	S
86	A	200.00sh of 90353T100 UBER TECHNOLOGIES INC COM	11,138.	10,962.	BYPASS8949		176.	S
87	A	600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	22,721.	20,640.	BYPASS8949		2,081.	S
88	A	1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	32,711.	32,268.	BYPASS8949		443.	S
89	A	1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	30,719.	30,180.	BYPASS8949		539.	S
90	A	1,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	32,279.	32,150.	BYPASS8949		129.	S
91	A	1,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	32,549.	32,250.	BYPASS8949		299.	S
92	A	3,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	94,478.	93,919.	BYPASS8949		559.	S
93	A	1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	45,919.	45,336.	W	521.	1,104.	S
94	A	1,100.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	32,669.	32,318.	W	781.	1,132.	S
95	A	1,200.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	35,180.	36,267.	W	1,212.	125.	S
96	A	1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	47,615.	47,161.	W	426.	880.	S
97	A	300.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	24,979.	25,033.	W	240.	186.	S
98	A	3,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	130,752.	127,460.	BYPASS8949		3,292.	S
99	A	1,000.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	46,009.	43,940.	BYPASS8949		2,069.	S
100	A	932.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	40,328.	39,964.	BYPASS8949		364.	S
101	A	1,721.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	76,352.	75,038.	BYPASS8949		1,314.	S
102	A	1,600.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	73,211.	72,747.	BYPASS8949		464.	S
103	A	2,857.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	132,959.	132,483.	BYPASS8949		476.	S
104	A	5,300.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	260,667.	259,433.	W	206.	1,440.	S
105	A	1,500.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	75,932.	75,235.	W	63.	760.	S
106	A	1,400.00sh of 910047109 UNITED AIRLINES HOLDINGS COM	70,152.	70,220.	W	484.	416.	S

Electronic Filing Instructions for your 2020 Illinois Tax Return

Important: Your taxes are not finished until all required steps are completed.

Sugarmaa Dorjdagva
2550 Waterview Dr
Northbrook, IL 60062

Balance Due/ Refund

Your Illinois state tax return (Form IL-1040) shows a balance due of $1,281.00.

Your return shows you have elected to pay your balance due of $1,281.00 by Direct Debit using the following information:

- Amount Withdrawn: $1,281.00
- Account Number: 8378116845
- Routing Transit Number: 125008547
- Date of Withdrawal: 04/15/2021

No Signature Document Needed

No signature form is required since you signed your return electronically.

What You Need to Keep

Your Electronic Filing Instructions (this form)
Printed copy of your state and federal returns
Copies of all W-2 and 1099 forms
Copies of other states' tax returns, if applicable

2020 Illinois Tax Return Summary

Taxable Income	$	46,950.00
Total Tax	$	2,324.00
Total Payments/Credits	$	1,043.00
Payment Due	$	1,281.00

Estimated Payments to Make for Next Year's Return

Illinois Estimated Payment Vouchers for 2021 - Do not mail the following vouchers (Form IL-1040-ES) with your 2020 income tax return. These vouchers are used to prepay your 2021 income taxes that will be filed next year.

Mail payments according to the schedule below:

Voucher Number	Due Date	Amount
1	04/15/2021	$ 321.00
2	06/15/2021	$ 321.00
3	09/15/2021	$ 321.00
4	01/18/2022	$ 321.00

Include a separate check or money order for each payment, payable to "Illinois Department of Revenue". Write your social security number and "2021 Form IL-1040-ES" on each check.

Electronic Filing Instructions for your 2020 Illinois Tax Return

Important: Your taxes are not finished until all required steps are completed.

Sugarmaa Dorjdagva
2550 Waterview Dr
Northbrook, IL 60062

Estimated Payments to Make for Next Year's Return (Continued)	Mail payments to: Illinois Department of Revenue Springfield, IL 62736-0001

VOUCHER 1

Illinois Department of Revenue

REV 03/17/21 TTMac

IL-1040-ES 2021

ID: 3WM

Estimated Income Tax Payment for Individuals

Official Use

Enter your Social Security numbers in the order they appear on your federal return.

183-51-4747 9 DORJ 0

Your Social Security number

Spouse's Social Security number

Calendar-Year Taxpayers

Your estimated tax payments are due on

- April 15, 2021
- June 15, 2021
- September 15, 2021
- January 18, 2022

Sugarmaa Dorjdagva
2550 Waterview Dr 154
Northbrook IL 60062

(571)388-6560

$ 321.00

Amount of payment (Whole dollars only)

Make check payable and mail this voucher to:

ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62736-0001

IL-1040-ES (R-12/21)

1 183514747 9 04151810 000000000 0 1221

VOUCHER 2

Illinois Department of Revenue

REV 03/17/21 TTMac

IL-1040-ES 2021

ID: 3WM

Estimated Income Tax Payment for Individuals

Official Use

Enter your Social Security numbers in the order they appear on your federal return.

183-51-4747 9 DORJ 0

Your Social Security number

Spouse's Social Security number

Calendar-Year Taxpayers

Your estimated tax payments are due on

- April 15, 2021
- June 15, 2021
- September 15, 2021
- January 18, 2022

Sugarmaa Dorjdagva
2550 Waterview Dr 154
Northbrook IL 60062

(571)388-6560

$ 321.00

Amount of payment (Whole dollars only)

Make check payable and mail this voucher to:

ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62736-0001

IL-1040-ES (R-12/21)

1 183514747 9 04151810 000000000 0 1221

VOUCHER 3

Illinois Department of Revenue

REV 03/17/21 TTMac

IL-1040-ES 2021

ID: 3WM

Estimated Income Tax Payment for Individuals

Official Use

Enter your Social Security numbers in the order they appear on your federal return.

183-51-4747 9 DORJ 0

Your Social Security number

Spouse's Social Security number

Calendar-Year Taxpayers

Your estimated tax payments are due on

- April 15, 2021
- September 15, 2021
- June 15, 2021
- January 18, 2022

Sugarmaa Dorjdagva
2550 Waterview Dr 154
Northbrook IL 60062

(571)388-6560

$ 321.00

Amount of payment (Whole dollars only)

Make check payable and mail this voucher to:

ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62736-0001

IL-1040-ES (R-12/21)

1 183514747 9 04151810 000000000 0 1221

VOUCHER 4

Illinois Department of Revenue

REV 03/17/21 TTMac

IL-1040-ES 2021

ID: 3WM

Estimated Income Tax Payment for Individuals

Official Use

Enter your Social Security numbers in the order they appear on your federal return.

183-51-4747 9 DORJ 0

Your Social Security number

Spouse's Social Security number

Calendar-Year Taxpayers

Your estimated tax payments are due on

- April 15, 2021
- September 15, 2021
- June 15, 2021
- January 18, 2022

Sugarmaa Dorjdagva
2550 Waterview Dr 154
Northbrook IL 60062

(571)388-6560

$ 321.00

Amount of payment (Whole dollars only)

Make check payable and mail this voucher to:

ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62736-0001

IL-1040-ES (R-12/21)

1 183514747 9 04151810 000000000 0 1221

Illinois Department of Revenue

2020 Form IL-1040

Individual Income Tax Return or for fiscal year ending __ __/__ __

Over 80% of taxpayers file electronically. It is easy and you will get your refund faster. Visit tax.illinois.gov.

Step 1: Personal Information

1989

183-51-4747

Sugarmaa Dorjdagva

2550 Waterview Dr 154

Northbrook IL 60062 COOK

B Filing status: ☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Widowed ☒ Head of household

C **Check** If someone can claim you, or your spouse if filing jointly, as a dependent. See instructions. ☐ You ☐ Spouse

D **Check** the box if this applies to you during 2020: ☐ Nonresident - **Attach** Sch. NR ☐ Part-year resident - **Attach** Sch. NR

Step 2: Income

(Whole dollars only)

1	Federal adjusted gross income from your federal Form 1040 or 1040-SR, Line 11.			1	51,600.00
2	Federally tax-exempt interest and dividend income from your federal Form 1040 or 1040-SR, Line 2a.			2	.00
3	Other additions. **Attach** Schedule M.			3	.00
4	**Total income**. Add Lines 1 through 3.			4	51,600.00

Step 3: Base Income

5	Social Security benefits and certain retirement plan income received if included in Line 1. **Attach** Page 1 of federal return.	5	.00		
6	Illinois Income Tax overpayment included in federal Form 1040 or 1040-SR, Schedule 1, Ln. 1.	6	.00		
7	Other subtractions. **Attach** Schedule M. Check if Line 7 includes any amount from Schedule 1299-C. ☐	7	.00		
8	Add Lines 5, 6, and 7. This is the total of your subtractions.			8	.00
9	**Illinois base income**. Subtract Line 8 from Line 4.			9	51,600.00

Step 4: Exemptions

10	**a** Enter the exemption amount for yourself and your spouse. **See instructions.**	a	2,325.00		
	b **Check** if 65 or older: ☐ You **+** ☐ Spouse **# of checkboxes X** $1,000 **=**	b	.00		
	c **Check** if legally blind: ☐ You **+** ☐ Spouse **# of checkboxes X** $1,000 **=**	c	.00		
	d If you are claiming dependents, enter the amount from Schedule IL-E/EIC, Step 2, Line 1. **Attach** Schedule IL-E/EIC.	d	2,325.00		
	Exemption allowance. Add Lines a through d.			10	4,650.00

Step 5: Net Income and Tax

11	***Residents:*** **Net income**. Subtract Line 10 from Line 9. ***Nonresidents and part-year residents:*** Enter the **Illinois net income** from Schedule NR. **Attach** Schedule NR.			11	46,950.00
12	***Residents:*** Multiply Line 11 by 4.95% (.0495). Cannot be less than zero. ***Nonresidents and part-year residents:*** Enter the tax from Schedule NR.			12	2,324.00
13	Recapture of investment tax credits. **Attach** Schedule 4255.			13	.00
14	**Income tax.** Add Lines 12 and 13. Cannot be less than zero.			14	2,324.00

Step 6: Tax After Nonrefundable Credits

15	Income tax paid to another state while an Illinois resident. **Attach** Schedule CR.	15	.00		
16	Property tax and K-12 education expense credit amount from Schedule ICR. **Attach** Schedule ICR.	16	.00		
17	Credit amount from Schedule 1299-C. **Attach** Schedule 1299-C.	17	.00		
18	Add Lines 15, 16, and 17. This is the total of your credits. Cannot exceed the tax amount on Line 14.			18	0.00
19	**Tax after nonrefundable credits.** Subtract Line 18 from Line 14.			19	2,324.00

Step 7: Other Taxes

20	Household employment tax. See instructions.			20	.00
21	Use tax on internet, mail order, or other out-of-state purchases from UT Worksheet or UT Table in the instructions. **Do not** leave blank.			21	0.00
22	Compassionate Use of Medical Cannabis Program Act and sale of assets by gaming licensee surcharges.			22	.00
23	**Total Tax**. Add Lines 19, 20, 21, and 22.			23	2,324.00

Staple W-2 and 1099 forms here

Staple your check and IL-1040-V

IL-1040 2D Front (R-12/20)

This form is authorized as outlined under the Illinois Income Tax Act. Disclosure of this information is required. Failure to provide information could result in a penalty.

ID: 3WM REV 03/17/21 TTMac

24 Total tax from Page 1, Line 23. **24** 2,324.00

Step 8: Payments and Refundable Credit

25 Illinois Income Tax withheld. **Attach** Schedule IL-WIT. **25** 1,043.00
26 Estimated payments from Forms IL-1040-ES and IL-505-I, including any overpayment applied from a prior year return. **26** .00
27 Pass-through withholding. **Attach** Schedule K-1-P or K-1-T. **27** .00
28 Earned Income Credit from Schedule IL-E/EIC, Step 4, Line 8. **Attach** Schedule IL-E/EIC. **28** .00
29 **Total payments and refundable credit**. Add Lines 25 through 28. **29** 1,043.00

Step 9: Total

30 If Line 29 is greater than Line 24, subtract Line 24 from Line 29. **30** .00
31 If Line 24 is greater than Line 29, subtract Line 29 from Line 24. **31** 1,281.00

Step 10: Underpayment of Estimated Tax Penalty and Donations - Only complete Step 10 for late-payment penalty for underpayment of estimated tax or to make a voluntary charitable donation.

32 Late-payment penalty for underpayment of estimated tax. **32** .00
- **a** ☐ Check if at least two-thirds of your federal gross income is from farming.
- **b** ☐ Check if you or your spouse are 65 or older and permanently living in a nursing home.
- **c** ☐ Check if your income was not received evenly during the year and you annualized your income on Form IL-2210. **Attach** Form IL-2210.
- **d** ☐ Check if you were not required to file an Illinois Individual Income Tax return in the previous tax year.

33 Voluntary charitable donations. **Attach** Schedule G. **33** .00
34 **Total penalty and donations**. Add Lines 32 and 33. **34** .00

Step 11: Refund

35 If you have an amount on Line 30 and this amount is greater than Line 34, subtract Line 34 from Line 30. This is your **overpayment**. **35** .00
36 Amount from Line 35 you want **refunded to you**. Check **one** box on Line 37. See instructions. **36** .00
37 I choose to receive my refund by
- **a** ☐ **direct deposit** - Complete the information below if you check this box.

Routing number ☐☐☐☐☐☐☐☐☐ ☐ Checking or ☐ Savings
Account number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

- **b** ☐ **Illinois Individual Income Tax refund debit card.** I acknowledge I have reviewed the card information found at **http://tax.illinois.gov/DebitCard** prior to making this election.
- **c** ☐ **paper check.**

38 Amount to be **credited forward.** Subtract Line 36 from Line 35. See instructions. **38** .00

Step 12: Amount You Owe

39 If you have an amount on Line 31, add Lines 31 and 34. **- or -** If you have an amount on Line 30 and this amount is less than Line 34, subtract Line 30 from Line 34. This is the **amount you owe**. See instructions. **39** 1,281.00

Step 13: If this is a joint return, both you and your spouse must sign below.
Under penalties of perjury, I state that I have examined this return and, to the best of my knowledge, it is true, correct, and complete.

Sign Here	Your signature	Date (mm/dd/yyyy)	Spouse's signature	Date (mm/dd/yyyy)	(571) 388-6560 Daytime phone number
Paid Preparer Use Only	Print/Type paid preparer's name		Self-Prepared Paid preparer's signature	Date (mm/dd/yyyy)	☐ Check if self-employed Paid Preparer's PTIN
	Firm's name ▸			Firm's FEIN ▸	
	Firm's address ▸			Firm's phone ▸	( )
Third Party Designee	Designee's name (please print)		( ) Designee's phone number		☐ Check if the Department may discuss this return with the third party designee shown in this step.

Refer to the 2020 IL-1040 Instructions for the address to mail your return.

IL-1040 2D Back (R-12/20)
Printed by authority of the State of Illinois - web only, 1.

DR________ AP________ RR DC IR ID

Illinois Department of Revenue

2020 Schedule IL-E/EIC Illinois Exemption and Earned Income Credit

Attach to your Form IL-1040

IL Attachment No. 30

Read this information first

Complete this schedule only if you are claiming dependents or are eligible for the Illinois Earned Income Credit. If you fraudulently claim the Earned Income Credit, you may not be allowed to claim the credit for up to ten years. You also may have to pay penalties.

You must have claimed the federal Earned Income Credit in order to claim the Illinois Earned Income Credit. The total amount of Illinois Earned Income Credit may exceed the amount of tax.

Note → If claiming the Illinois Earned Income Credit, you must attach a copy of pages 1 and 2 of your federal Form 1040 or 1040-SR to this schedule.

Step 1: Provide the following information

Sugarmaa Dorjdagva
Your name as shown on your Form IL-1040

1 8 3 - 5 1 - 4 7 4 7
Your Social Security number

Illinois Dependent Exemption Allowance

Step 2: Dependent information

Complete the table for each person you are claiming as a dependent. ***Note:*** *If you are claiming more than ten dependents, complete and attach additional Dependent information tables.*

Dependent's first name	Dependent's last name	Social Security number	Dependent's relationship to you	Dependent's date of birth (mm/dd/yyyy)	Full time student	Person with disability	Number of months living with you	Eligible for Earned Income Credit
Amina	Batsaikhan	826-60-6023	Daughter	08/27/2019	☐	☐	12	☒
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐
					☐	☐		☐

1 Multiply the total number of dependents you are claiming by $2,325. 1 X $2,325
Enter the result here and on Form IL-1040, Line 10d. **1** 2,325.00

Continue to Page 2 to calculate Illinois Earned Income Credit →

Illinois Earned Income Credit

Complete this section **only** if you qualify for the Illinois Earned Income Credit. Attach a copy of federal Form 1040 or 1040-SR, Pages 1 and 2.

Note **If you are not claiming a qualifying child, do not complete the table below.**

Step 3: Qualifying Child Information

Complete the table for qualifying children that are **not** included in Step 2.

Child's first name	Child's last name	Social Security number	Child's relationship to you	Child's date of birth (mm/dd/yyyy)	Full time student	Person with disability	Number of months living with you
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	
					☐	☐	

1 Enter your wages, salaries and tips from your federal Form 1040 or 1040-SR, Line 1. **1** _______ .00

2 Enter your business income or (loss) from your federal Form 1040 or 1040-SR, Schedule 1, Line 3.
If you report an amount on Line 2, you must answer the question in Line 2a below. **2** _______ .00

2a Does your occupation require a city, state, or county issued professional license, registration, or certification? **2a** Yes ☐ No ☐

2b If you answered **"Yes"** to Line 2a, you must enter the name of the issuing agency and your license, registration, or certification number.

Issuing Agency	License, Registration, or Certification Number

3 If you are filing your 2020 federal return as married filing jointly but are filing your 2020 Illinois return as married filing separately, enter your federal adjusted gross income (AGI) from your married filing jointly federal Form 1040 or 1040-SR, Line 11. **3** _______ .00

3a If you entered an amount on Line 3, enter your spouse's Social Security number from your married filing jointly federal return. **3a** _ _ _ - _ _ - _ _ _ _

4 Is the statutory employee box marked on your W-2, Wage and Tax Statement, Box 13? **4** Yes ☐ No ☐

Step 4: Figure your Illinois Earned Income Credit

5 Enter the amount of federal Earned Income Credit from your federal Form 1040 or 1040-SR, Line 27. **5** _______ .00

6 Multiply the amount on Line 5 by 18% (.18). **6** _______ .00

7 **Illinois residents:** Enter 1.0.
Nonresidents and part-year residents: Enter the decimal from Schedule NR, Line 48. **7** ___ • ___

8 Multiply Line 6 by the decimal on Line 7. This is your Illinois Earned Income Credit.
Enter this amount here and on your Form IL-1040, Line 28. ➡ **8** _______ .00

Remember: Intentionally submitting false information is a crime under Section 1301 of the Illinois Income Tax Act

Illinois Department of Revenue

2020 Schedule IL-WIT Illinois Income Tax Withheld

Attach to your Form IL-1040. If you have more than five withholding forms, complete multiple copies of this schedule. **IL Attachment No. 31**

Use the reference for Column A shown in the chart below.

Form Type	Letter Code for Column A	Form Type	Letter Code for Column A
W-2	W	1099-DIV	D
W-2G	WG	1099-INT	I
1099-R	R	1042-S	S
1099-G	G	1099-B	B
1099-MISC	M	1099-K	K
1099-OID	O	1099-NEC	N

Step 1: Provide your withholding records (include all W-2 and 1099 forms that show Illinois withholding)

Sugarmaa Dorjdagva
Your name as shown on Form IL-1040

1 8 3 - 5 1 - 4 7 4 7
Your Social Security number

	Column A Form type	Column B Employer/Payer Identification Number	Column C Federal Wages, Winnings, Gross Distributions, Compensation, etc.	Column D Illinois Wages, Winnings, Gross Distributions, Compensation, etc.	Column E Illinois Income Tax Withheld
1	G	36-3042127	$ 20,938.00	$ 20,938.00	$ 1,043.00
2			$ .00	$ .00	$ .00
3			$ .00	$ .00	$ .00
4			$ .00	$ .00	$ .00
5			$ .00	$ .00	$ .00

Step 2: Provide spouse's withholding records (include all W-2 and 1099 forms that show Illinois withholding)

Your spouse's name as shown on Form IL-1040

_ _ _ - _ _ - _ _ _ _
Your spouse's Social Security number

	Column A Form type	Column B Employer/Payer Identification Number	Column C Federal Wages, Winnings, Gross Distributions, Compensation, etc.	Column D Illinois Wages, Winnings, Gross Distributions, Compensation, etc.	Column E Illinois Income Tax Withheld
6			$ .00	$ .00	$ .00
7			$ .00	$ .00	$ .00
8			$ .00	$ .00	$ .00
9			$ .00	$ .00	$ .00
10			$ .00	$ .00	$ .00

Step 3: Total Illinois withholding

11 Add the amounts in Column E for Lines 1 through 10 (and the amounts from Column E of any additional copies you attached). This is the total amount of your Illinois income tax withheld. Enter this amount here and on Form IL-1040, Line 25. **11** $ 1,043.00

→ Attach all Schedules IL-WIT to your IL-1040. ←

Form **1040** Department of the Treasury—Internal Revenue Service (99)

U.S. Individual Income Tax Return

2020 OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

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

Check only one box.

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

Your first name and middle initial Sugarmaa	Last name Dorjdagva	**Your social security number** 183-51-4747
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. 2550 Waterview Dr

Apt. no. 154

City, town, or post office. If you have a foreign address, also complete spaces below. Northbrook

State IL

ZIP code 60062

Foreign country name

Foreign province/state/county

Foreign postal code

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ **You** ☐ **Spouse**

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire 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, 1956 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1956 ☐ Is blind

Dependents (see instructions):

If more than four dependents, see instructions and check here ▶ ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✔ if qualifies for (see instructions): Child tax credit	Credit for other dependents
Amina	Batsaikhan	826-60-6023	Daughter	☒	☐
				☐	☐
				☐	☐
				☐	☐

1	Wages, salaries, tips, etc. Attach Form(s) W-2				1	
2a	Tax-exempt interest	2a		b Taxable interest	2b	0.
3a	Qualified dividends	3a		b Ordinary dividends	3b	
4a	IRA distributions	4a		b Taxable amount	4b	
5a	Pensions and annuities	5a		b Taxable amount	5b	
6a	Social security benefits	6a		b Taxable amount	6b	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐				7	40,862.
8	Other income from Schedule 1, line 9				8	10,738.
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** ▶				9	51,600.
10	Adjustments to income:					
a	From Schedule 1, line 22	10a				
b	Charitable contributions if you take the standard deduction. See instructions	10b				
c	Add lines 10a and 10b. These are your **total adjustments to income** ▶				10c	
11	Subtract line 10c from line 9. This is your **adjusted gross income** ▶				11	51,600.
12	**Standard deduction or itemized deductions** (from Schedule A)				12	18,650.
13	Qualified business income deduction. Attach Form 8995 or Form 8995-A				13	
14	Add lines 12 and 13				14	18,650.
15	**Taxable income.** Subtract line 14 from line 11. If zero or less, enter -0-				15	32,950.

Attach Sch. B if required.

Standard Deduction for—
- Single or Married filing separately, $12,400
- Married filing jointly or Qualifying widow(er), $24,800
- Head of household, $18,650
- If you checked any box under *Standard Deduction,* see instructions.

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

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐			16	3,675.
17	Amount from Schedule 2, line 3			17	
18	Add lines 16 and 17			18	3,675.
19	Child tax credit or credit for other dependents			19	2,000.
20	Amount from Schedule 3, line 7			20	
21	Add lines 19 and 20			21	2,000.
22	Subtract line 21 from line 18. If zero or less, enter -0-			22	1,675.
23	Other taxes, including self-employment tax, from Schedule 2, line 10			23	0.
24	Add lines 22 and 23. This is your **total tax** ▶			24	1,675.
25	Federal income tax withheld from:				
a	Form(s) W-2	25a			
b	Form(s) 1099	25b	2,079.		
c	Other forms (see instructions)	25c			
d	Add lines 25a through 25c			25d	2,079.
26	2020 estimated tax payments and amount applied from 2019 return			26	
27	Earned income credit (EIC)	27			
28	Additional child tax credit. Attach Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Recovery rebate credit. See instructions	30			
31	Amount from Schedule 3, line 13	31			
32	Add lines 27 through 31. These are your **total other payments and refundable credits** ▶			32	
33	Add lines 25d, 26, and 32. These are your **total payments** ▶			33	2,079.

- If you have a qualifying child, attach Sch. EIC.
- If you have nontaxable combat pay, see instructions.

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**			34	404.
35a	Amount of line 34 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐			35a	404.
▶ b	Routing number 1 2 5 0 0 8 5 4 7 ▶ **c** Type: ☒ Checking ☐ Savings				
▶ d	Account number 8 3 7 8 1 1 6 8 4 5				
36	Amount of line 34 you want **applied to your 2021 estimated tax** ▶	36			

Direct deposit? See instructions.

Amount You Owe

For details on how to pay, see instructions.

37	Subtract line 33 from line 24. This is the **amount you owe now** ▶			37	
	Note: Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.				
38	Estimated tax penalty (see instructions) ▶	38			

Third Party Designee

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

Designee's name ▶

Phone no. ▶

Personal identification number (PIN) ▶

Sign Here

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

Joint return? See instructions. Keep a copy for your records.

Your signature	Date	Your occupation Nail Technician Assistant	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) ▶
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) ▶
Phone no.	Email address		

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
Firm's name ▶ Self-Prepared				Phone no.
Firm's address ▶				Firm's EIN ▶