



**2021 Federal Tax Return Filing Instructions**  
**FOR THE YEAR ENDING**  
December 31, 2021

<b>Prepared for</b>	DAVID C VASQUEZ																								
<b>Tax Summary</b>	<table style="width: 100%; border-collapse: collapse;"><tr><td style="width: 60%;">Gross Income.....</td><td style="width: 5%; text-align: center;">_____</td><td style="width: 35%; text-align: right;">\$48650</td></tr><tr><td>Adjusted Gross Income.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$48428</td></tr><tr><td>Total Deductions.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$12550</td></tr><tr><td>Total Taxable Income.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$35878</td></tr><tr><td>Total Tax.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$3087</td></tr><tr><td>Total Payments.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$6408</td></tr><tr><td>Refund Amount.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$3321</td></tr><tr><td>Amount You Owe.....</td><td style="text-align: center;">_____</td><td style="text-align: right;">\$0</td></tr></table>	Gross Income.....	_____	\$48650	Adjusted Gross Income.....	_____	\$48428	Total Deductions.....	_____	\$12550	Total Taxable Income.....	_____	\$35878	Total Tax.....	_____	\$3087	Total Payments.....	_____	\$6408	Refund Amount.....	_____	\$3321	Amount You Owe.....	_____	\$0
Gross Income.....	_____	\$48650																							
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Total Payments.....	_____	\$6408																							
Refund Amount.....	_____	\$3321																							
Amount You Owe.....	_____	\$0																							
<b>Make check payable to</b>																									
<b>Mailing Address</b>	Since you are filing your return electronically and you chose to use an electronic signature, you do not mail your return.																								

**Instructions**

If you e-filed your return and it has been accepted, you will get notified via text or email if you opted for that option.



# 2021 STATE TAX RETURN FILING INSTRUCTIONS

OREGON  
FOR THE YEAR ENDING  
December 31, 2021

Prepared for	DAVID C VASQUEZ																					
Tax Summary	<table><tr><td>Adjusted Gross Income.....</td><td>\$</td><td>0</td></tr><tr><td>Total Deductions.....</td><td>\$</td><td>0</td></tr><tr><td>Total Taxable Income.....</td><td>\$</td><td>45,341</td></tr><tr><td>Total Tax.....</td><td>\$</td><td>3,501</td></tr><tr><td>Total Payments.....</td><td>\$</td><td>3,743</td></tr><tr><td>Refund Amount.....</td><td>\$</td><td>455</td></tr><tr><td>Amount You Owe.....</td><td>\$</td><td>0</td></tr></table>	Adjusted Gross Income.....	\$	0	Total Deductions.....	\$	0	Total Taxable Income.....	\$	45,341	Total Tax.....	\$	3,501	Total Payments.....	\$	3,743	Refund Amount.....	\$	455	Amount You Owe.....	\$	0
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Refund Amount.....	\$	455																				
Amount You Owe.....	\$	0																				
Make check payable to																						
Mailing Address	Since you are filing your return electronically and you chose to use an electronic signature, you do not mail your return.																					

## Special Instructions

Keep A Copy

Click on Main Menu and then E-File or Print to print your return. Attach your copy of each W-2, W-2G, 1099R or 1099G with withholding. Keep with your records for three years.

# 2021 TWO YEAR COMPARISON

DAVID C VASQUEZ  
606-05-4563

Keep for Your Records

	2021	2020	Difference
Filing status .....	Single		
<b>INCOME:</b>			
Wages, salaries, tips, etc. ....	48,316		48,316
Interest income .....			
Ordinary dividend income .....			
IRA distributions and pension income .....			
Taxable social security income .....			
Capital gain or (loss) (Schedule D) .....	334		334
<b>Schedule 1 - Income</b>			
Refunds of state and local taxes .....			
Business income or (loss) (Schedule C) .....			
Other gains or (losses) (Form 4797) .....			
Rental real estate, partnerships, estates, etc. (Schedule E) ....			
Farm income or (loss) (Schedule F) .....			
Unemployment compensation .....			
Other income .....			
<b>Total income</b> .....	48,650		48,650
<b>ADJUSTMENTS:</b>			
<b>Schedule 1 - Adjustments</b>			
Deductible part of self-employment tax .....			
Self-employed SEP, SIMPLE and qualified plans deduction. ...			
Self-employed health insurance .....			
IRA contributions .....			
Student loan interest deduction .....	222		222
Other adjustments .....			
Charitable contributions if taking standard deduction .....	N/A		
<b>Total adjustments</b> .....	222		222
<b>ADJUSTED GROSS INCOME:</b> .....	48,428		48,428
<b>DEDUCTIONS:</b>			
Standard deduction or Itemized deductions .....	12,550		12,550
Charitable contributions if taking standard deduction, .....		N/A	
If itemized, Schedule A deductions:			
Medical and dental expenses .....			
Sales, income, and other taxes paid .....	3,474		3,474
Interest paid .....			
Gifts to charity .....			
Casualty and theft losses .....			
Other miscellaneous deductions .....			
Qualified business income deduction .....			
<b>TAXABLE INCOME:</b> .....	35,878		35,878
<b>TAX COMPUTATION (BEFORE CREDITS):</b>			
Tax .....	4,106		4,106
Tax calculation method .....	TABLE		
<b>Schedule 2 - Taxes</b>			
Alternative minimum tax .....			
Excess advance premium tax credit repayment .....			
<b>Total taxes</b> .....	4,106		4,106
<b>Tax rate</b> .....	12%		

## Tax Calculation Methods:

Sch D = Sch D tax worksheet  
Sch J = Inc Aver for Farmer/Fisherman  
FEITW = Foreign Earned Income Tax WS

QDCGTW = Qual Div Cap Gain Tax WS  
F8615 = Child with unearned income

TCW = Tax Comp Worksheet (rates)  
TABLE = Tax Table

# 2021 TWO YEAR COMPARISON

DAVID C VASQUEZ  
606-05-4563

Keep for Your Records

	2021	2020	Difference
<b>CREDITS:</b>			
Child and other dependents tax credit . . . . .			
<b>Schedule 3 - Non-Refundable Credits</b>			
Foreign tax credit . . . . .			
Child care credit . . . . .			
Education credit . . . . .	1,019		1,019
Retirement savings contribution credit . . . . .			
Other credits . . . . .			
<b>Total credits</b> . . . . .	1,019		1,019
<b>OTHER TAXES:</b>			
<b>Schedule 2 - Other Taxes</b>			
Self-employment tax . . . . .			
Additional tax on IRAs . . . . .			
Health Care (Individual Responsibility) . . . . .			
Other taxes . . . . .			
<b>TOTAL TAXES:</b> . . . . .	3,087		3,087
<b>PAYMENTS:</b>			
Federal income tax withheld . . . . .	6,408		6,408
Estimated payments made . . . . .			
Earned income credit . . . . .			
Refundable child tax credit or additional child tax credit . . . . .			
American opportunity credit . . . . .			
Recovery rebate credit . . . . .			
<b>Schedule 3 - Refundable Credits &amp; Payments</b>			
ACA premium tax credit . . . . .			
Qualified sick and family leave credit . . . . .			
Deferral for certain Schedule H or Schedule SE filers . . . . .		N/A	
Other payments . . . . .			
<b>Total payments</b> . . . . .	6,408		6,408
<b>AMOUNT DUE / REFUND:</b>			
Amount overpaid . . . . .	3,321		3,321
Overpayment applied to next year . . . . .			
<b>Refund</b> . . . . .	3,321		3,321
<b>Amount due</b> . . . . .			
Penalty . . . . .			

Form	<b>1040</b>	Department of the Treasury--Internal Revenue Service (99) <b>U.S. Individual Income Tax Return</b>	<b>2021</b>	OMB No. 1545-0074	IRS Use Only--Do not write or staple in this space.
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**Filing Status** ☒ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)

Check only ☐ 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 one box. ☐ qualifying person is a child but not your dependent ▶

Your first name and middle initial <b>DAVID C</b>	Last name <b>VASQUEZ</b>	Your social security number <b>606-05-4563</b>
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. <b>155 NW KINGS BLVD</b>		Apt. no. <b>647</b>	<b>Presidential Election Campaign</b> Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
City, town, or post office. If you have a foreign address, also complete spaces below. <b>CORVALLIS</b>	State <b>OR</b>	ZIP code <b>97330</b>	
Foreign country name	Foreign province/state/county	Foreign postal code	

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

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

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

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see inst.):	
(1) First name	Last name			Child tax credit	Credit for other dependents

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

Attach Sch. B if required.  <b>Standard Deduction for--</b> • Single or Married filing separately, \$12,550 • Married filing jointly or Qualifying widow(er), \$25,100 • Head of household, \$18,800 • If you checked any box under Standard Deduction, see instructions.	<table style="width:100%;"> <tr> <td style="width:50%;"> <b>1</b> Wages, salaries, tips, etc. Attach Form(s) W-2  <b>2a</b> Tax-exempt interest  <b>3a</b> Qualified dividends  <b>4a</b> IRA distributions  <b>5a</b> Pensions and annuities  <b>6a</b> Social security benefits  <b>7</b> Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>  <b>8</b> Other income from Schedule 1, line 10  <b>9</b> Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b>  <b>10</b> Adjustments to income from Schedule 1, line 26  <b>11</b> Subtract line 10 from line 9. This is your <b>adjusted gross income</b>  <b>12a</b> <b>Standard deduction or itemized deductions</b> (from Schedule A)  <b>b</b> Charitable contributions if you take the standard deduction (see instructions)  <b>c</b> Add lines 12a and 12b  <b>13</b> Qualified business income deduction from Form 8995 or Form 8995-A  <b>14</b> Add lines 12c and 13  <b>15</b> <b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0-               </td> <td style="width:50%;"> <table style="width:100%;"> <tr><td><b>1</b></td><td style="text-align: right;">48,316</td></tr> <tr><td><b>2b</b></td><td></td></tr> <tr><td><b>3b</b></td><td></td></tr> <tr><td><b>4b</b></td><td></td></tr> <tr><td><b>5b</b></td><td></td></tr> <tr><td><b>6b</b></td><td></td></tr> <tr><td><b>7</b></td><td style="text-align: right;">334</td></tr> <tr><td><b>8</b></td><td></td></tr> <tr><td><b>9</b></td><td style="text-align: right;">48,650</td></tr> <tr><td><b>10</b></td><td style="text-align: right;">222</td></tr> <tr><td><b>11</b></td><td style="text-align: right;">48,428</td></tr> <tr><td><b>12a</b></td><td style="text-align: right;">12,550</td></tr> <tr><td><b>12b</b></td><td></td></tr> <tr><td><b>12c</b></td><td style="text-align: right;">12,550</td></tr> <tr><td><b>13</b></td><td></td></tr> <tr><td><b>14</b></td><td style="text-align: right;">12,550</td></tr> <tr><td><b>15</b></td><td style="text-align: right;">35,878</td></tr> </table> </td> </tr> </table>	<b>1</b> Wages, salaries, tips, etc. Attach Form(s) W-2 <b>2a</b> Tax-exempt interest <b>3a</b> Qualified dividends <b>4a</b> IRA distributions <b>5a</b> Pensions and annuities <b>6a</b> Social security benefits <b>7</b> Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/> <b>8</b> Other income from Schedule 1, line 10 <b>9</b> Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> <b>10</b> Adjustments to income from Schedule 1, line 26 <b>11</b> Subtract line 10 from line 9. This is your <b>adjusted gross income</b> <b>12a</b> <b>Standard deduction or itemized deductions</b> (from Schedule A) <b>b</b> Charitable contributions if you take the standard deduction (see instructions) <b>c</b> Add lines 12a and 12b <b>13</b> Qualified business income deduction from Form 8995 or Form 8995-A <b>14</b> Add lines 12c and 13 <b>15</b> <b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0-	<table style="width:100%;"> <tr><td><b>1</b></td><td style="text-align: right;">48,316</td></tr> <tr><td><b>2b</b></td><td></td></tr> <tr><td><b>3b</b></td><td></td></tr> <tr><td><b>4b</b></td><td></td></tr> <tr><td><b>5b</b></td><td></td></tr> <tr><td><b>6b</b></td><td></td></tr> <tr><td><b>7</b></td><td style="text-align: right;">334</td></tr> <tr><td><b>8</b></td><td></td></tr> <tr><td><b>9</b></td><td style="text-align: right;">48,650</td></tr> <tr><td><b>10</b></td><td style="text-align: right;">222</td></tr> <tr><td><b>11</b></td><td style="text-align: right;">48,428</td></tr> <tr><td><b>12a</b></td><td style="text-align: right;">12,550</td></tr> <tr><td><b>12b</b></td><td></td></tr> <tr><td><b>12c</b></td><td style="text-align: right;">12,550</td></tr> <tr><td><b>13</b></td><td></td></tr> <tr><td><b>14</b></td><td style="text-align: right;">12,550</td></tr> <tr><td><b>15</b></td><td style="text-align: right;">35,878</td></tr> </table>	<b>1</b>	48,316	<b>2b</b>		<b>3b</b>		<b>4b</b>		<b>5b</b>		<b>6b</b>		<b>7</b>	334	<b>8</b>		<b>9</b>	48,650	<b>10</b>	222	<b>11</b>	48,428	<b>12a</b>	12,550	<b>12b</b>		<b>12c</b>	12,550	<b>13</b>		<b>14</b>	12,550	<b>15</b>	35,878
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**For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.**

Form **1040** (2021)

<b>16 Tax</b> (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	<b>16</b> 4,106															
<b>17</b> Amount from Schedule 2, line 3	<b>17</b>															
<b>18</b> Add lines 16 and 17	<b>18</b> 4,106															
<b>19</b> Nonrefundable child tax credit or credit for other dependents from Schedule 8812	<b>19</b>															
<b>20</b> Amount from Schedule 3, line 8	<b>20</b> 1,019															
<b>21</b> Add lines 19 and 20	<b>21</b> 1,019															
<b>22</b> Subtract line 21 from line 18. If zero or less, enter -0-	<b>22</b> 3,087															
<b>23</b> Other taxes, including self-employment tax, from Schedule 2, line 21	<b>23</b>															
<b>24</b> Add lines 22 and 23. This is your <b>total tax</b>	<b>24</b> 3,087															
<b>25</b> Federal income tax withheld from:																
<b>a</b> Form(s) W-2	<b>25a</b> 6,408															
<b>b</b> Form(s) 1099	<b>25b</b>															
<b>c</b> Other forms (see instructions)	<b>25c</b>															
<b>d</b> Add lines 25a through 25c	<b>25d</b> 6,408															
<b>26</b> 2021 estimated tax payments and amount applied from 2020 return	<b>26</b>															
<div style="border: 1px solid black; padding: 2px; width: fit-content;">             If you have a qualifying child, attach Sch. EIC.           </div> <b>27a</b> Earned income credit (EIC) <div style="margin-top: 5px;">             Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18, to claim the EIC. See instructions ... <input type="checkbox"/> </div>																
<b>b</b> Nontaxable combat pay election	<b>27b</b>															
<b>c</b> Prior year (2019) earned income	<b>27c</b>															
<b>28</b> Refundable child tax credit or additional child tax credit from Schedule 8812	<b>28</b>															
<b>29</b> American opportunity credit from Form 8863, line 8	<b>29</b>															
<b>30</b> Recovery rebate credit. See instructions.	<b>30</b>															
<b>31</b> Amount from Schedule 3, line 15	<b>31</b>															
<b>32</b> Add lines 27a and 28 through 31. These are your <b>total other payments and refundable credits</b>	<b>32</b>															
<b>33</b> Add lines 25d, 26, and 32. These are your <b>total payments</b>	<b>33</b> 6,408															
<b>Refund</b> <b>34</b> If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b>	<b>34</b> 3,321															
<b>35a</b> Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here <input type="checkbox"/>	<b>35a</b> 3,321															
Direct deposit? <input checked="" type="checkbox"/> <b>b</b> Routing number 123000220 <b>c</b> Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings See instructions. <b>d</b> Account number 153654725776																
<b>36</b> Amount of line 34 you want <b>applied to your 2022 estimated tax</b>	<b>36</b>															
<b>Amount You Owe</b> <b>37</b> <b>Amount you owe</b> . Subtract line 33 from line 24. For details on how to pay, see instructions	<b>37</b>															
<b>38</b> Estimated tax penalty (see instructions)	<b>38</b>															
<b>Third Party Designee</b> Do you want to allow another person to discuss this return with the IRS? See instructions ... <input type="checkbox"/> <b>Yes</b> . Complete below. <input checked="" type="checkbox"/> <b>No</b>																
Designee's name ▶	Phone no. ▶															
Personal identification number (PIN) ▶																
<b>Sign Here</b> 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? <input type="checkbox"/> See instructions. Keep a copy for your records.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Your signature</td> <td style="width: 15%;">Date</td> <td style="width: 30%;">Your occupation Student</td> <td style="width: 25%;">If the IRS sent you an Identity Protection PIN, enter it here (see inst.) ▶</td> </tr> <tr> <td>Spouse's signature. If a joint return, <b>both</b> must sign.</td> <td>Date</td> <td>Spouse's occupation</td> <td>If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) ▶</td> </tr> </table>	Your signature	Date	Your occupation Student	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) ▶	Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) ▶							
Your signature	Date	Your occupation Student	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) ▶													
Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) ▶													
Phone no. 925-818-1175	Email address Vasquezd@oregonstate.edu															
<b>Paid Preparer Use Only</b>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Preparer's name</td> <td style="width: 30%;">Preparer's signature</td> <td style="width: 15%;">Date</td> <td style="width: 15%;">PTIN</td> <td style="width: 10%;">Check if: <input type="checkbox"/> Self-employed</td> </tr> <tr> <td>Firm's name ▶</td> <td colspan="3">Firm's address ▶</td> <td>Phone no.</td> </tr> <tr> <td colspan="4"></td> <td>Firm's EIN ▶</td> </tr> </table>	Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed	Firm's name ▶	Firm's address ▶			Phone no.					Firm's EIN ▶
Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed												
Firm's name ▶	Firm's address ▶			Phone no.												
				Firm's EIN ▶												

Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.Form **1040** (2021)

**SCHEDULE 1**

(Form 1040)

**Additional Income and Adjustments to Income**

OMB No. 1545-0074

**2021**Attachment  
Sequence No. **01**Department of the Treasury  
Internal Revenue Service

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

▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

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

DAVID C VASQUEZ

Your social security number

606-05-4563

**Part I Additional Income**

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

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

Schedule 1 (Form 1040) 2021

**Part II Adjustments to Income**

<b>11</b>	Educator expenses .....	<b>11</b>	
<b>12</b>	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 .....	<b>12</b>	
<b>13</b>	Health savings account deduction. Attach Form 8889 .....	<b>13</b>	
<b>14</b>	Moving expenses for members of the Armed Forces. Attach Form 3903 .....	<b>14</b>	
<b>15</b>	Deductible part of self-employment tax. Attach Schedule SE .....	<b>15</b>	
<b>16</b>	Self-employed SEP, SIMPLE, and qualified plans .....	<b>16</b>	
<b>17</b>	Self-employed health insurance deduction .....	<b>17</b>	
<b>18</b>	Penalty on early withdrawal of savings .....	<b>18</b>	
<b>19a</b>	Alimony paid .....	<b>19a</b>	
<b>b</b>	Recipient's SSN. .... ▶		
<b>c</b>	Date of original divorce or separation agreement (see instructions) ▶		
<b>20</b>	IRA deduction .....	<b>20</b>	
<b>21</b>	Student loan interest deduction .....	<b>21</b>	222
<b>22</b>	Reserved for future use .....	<b>22</b>	
<b>23</b>	Archer MSA deduction .....	<b>23</b>	
<b>24</b>	Other adjustments:		
<b>a</b>	Jury duty pay (see instructions) .....	<b>24a</b>	
<b>b</b>	Deductible expenses related to income reported on line 8k from the rental of personal property engaged in for profit .....	<b>24b</b>	
<b>c</b>	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8l .....	<b>24c</b>	
<b>d</b>	Reforestation amortization and expenses .....	<b>24d</b>	
<b>e</b>	Repayment of supplemental unemployment benefits under the Trade Act of 1974 .....	<b>24e</b>	
<b>f</b>	Contributions to section 501(c)(18)(D) pension plans .....	<b>24f</b>	
<b>g</b>	Contributions by certain chaplains to section 403(b) plans .....	<b>24g</b>	
<b>h</b>	Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions) .....	<b>24h</b>	
<b>i</b>	Attorney fees and court costs you paid in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations .....	<b>24i</b>	
<b>j</b>	Housing deduction from Form 2555 .....	<b>24j</b>	
<b>k</b>	Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041) .....	<b>24k</b>	
<b>z</b>	Other adjustments. List type and amount ▶	<b>24z</b>	
<b>25</b>	Total other adjustments. Add lines 24a through 24z .....	<b>25</b>	
<b>26</b>	Add lines 11 through 23 and 25. These are your <b>adjustments to income</b> . Enter here and on Form 1040 or 1040-SR, line 10, or Form 1040-NR, line 10a .....	<b>26</b>	222



**SCHEDULE 3**

(Form 1040)

**Additional Credits and Payments**

OMB No. 1545-0074

**2021**Attachment  
Sequence No. **03**Department of the Treasury  
Internal Revenue Service▶ **Attach to Form 1040, 1040-SR, or 1040-NR.**▶ **Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.**

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

DAVID C VASQUEZ

Your social security number

606-05-4563

**Part I Nonrefundable Credits**

<b>1</b>	Foreign tax credit. Attach Form 1116 if required .....	<b>1</b>	
<b>2</b>	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441 .....	<b>2</b>	
<b>3</b>	Education credits from Form 8863, line 19 .....	<b>3</b>	1,019
<b>4</b>	Retirement savings contributions credit. Attach Form 8880 .....	<b>4</b>	
<b>5</b>	Residential energy credits. Attach Form 5695 .....	<b>5</b>	
<b>6</b>	Other nonrefundable credits:		
<b>a</b>	General business credit. Attach Form 3800 .....	<b>6a</b>	
<b>b</b>	Credit for prior year minimum tax. Attach Form 8801 .....	<b>6b</b>	
<b>c</b>	Adoption credit. Attach Form 8839 .....	<b>6c</b>	
<b>d</b>	Credit for the elderly or disabled. Attach Schedule R .....	<b>6d</b>	
<b>e</b>	Alternative motor vehicle credit. Attach Form 8910 .....	<b>6e</b>	
<b>f</b>	Qualified plug-in motor vehicle credit. Attach Form 8936 .....	<b>6f</b>	
<b>g</b>	Mortgage interest credit. Attach Form 8396 .....	<b>6g</b>	
<b>h</b>	District of Columbia first-time homebuyer credit. Attach Form 8859 .....	<b>6h</b>	
<b>i</b>	Qualified electric vehicle credit. Attach Form 8834 .....	<b>6i</b>	
<b>j</b>	Alternative fuel vehicle refueling property credit. Attach Form 8911 .....	<b>6j</b>	
<b>k</b>	Credit to holders of tax credit bonds. Attach Form 8912 .....	<b>6k</b>	
<b>l</b>	Amount on Form 8978, line 14. See instructions .....	<b>6l</b>	
<b>z</b>	Other nonrefundable credits. List type and amount ▶ .....	<b>6z</b>	
<b>7</b>	Total other nonrefundable credits. Add lines 6a through 6z .....	<b>7</b>	
<b>8</b>	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20 .....	<b>8</b>	1,019

(continued on page 2)

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

Schedule 3 (Form 1040) 2021

**Part II Other Payments and Refundable Credits**

<b>9</b>	Net premium tax credit. Attach Form 8962 .....	<b>9</b>	
<b>10</b>	Amount paid with request for extension to file (see instructions) .....	<b>10</b>	
<b>11</b>	Excess social security and tier 1 RRTA tax withheld .....	<b>11</b>	
<b>12</b>	Credit for federal tax on fuels. Attach Form 4136 .....	<b>12</b>	
<b>13</b>	Other payments or refundable credits:		
<b>a</b>	Form 2439 .....	<b>13a</b>	
<b>b</b>	Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken before April 1, 2021 .....	<b>13b</b>	
<b>c</b>	Health coverage tax credit from Form 8885 .....	<b>13c</b>	
<b>d</b>	Credit for repayment of amounts included in income from earlier years .....	<b>13d</b>	
<b>e</b>	Reserved for future use .....	<b>13e</b>	
<b>f</b>	Deferred amount of net 965 tax liability (see instructions) .....	<b>13f</b>	
<b>g</b>	Credit for child and dependent care expenses from Form 2441, line 10. Attach Form 2441 .....	<b>13g</b>	
<b>h</b>	Qualified sick and family leave credits from Schedule(s) H and Form(s) 7202 for leave taken after March 31, 2021 .....	<b>13h</b>	
<b>z</b>	Other payments or refundable credits. List type and amount ► .....	<b>13z</b>	
<b>14</b>	Total other payments or refundable credits. Add lines 13a through 13z .....	<b>14</b>	
<b>15</b>	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31. ....	<b>15</b>	

Schedule 3 (Form 1040) 2021

**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](http://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

**2021**Attachment  
Sequence No. **12**

Name(s) shown on return

DAVID C VASQUEZ

Your social security number

606-05-4563

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)
<b>1a</b> 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 . . . . .				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .				
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .	15,859	15,832	65	92
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .	9,468	9,226		242
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 . . . . .			<b>4</b>	
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .			<b>5</b>	
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .			<b>6</b> ( )	
<b>7</b> <b>Net short-term capital gain or (loss).</b> 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 page 2 . . . . .			<b>7</b>	334

**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)
<b>8a</b> 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 . . . . .				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .				
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .				
<b>11</b> 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 . . . . .			<b>11</b>	
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .			<b>12</b>	
<b>13</b> Capital gain distributions. See the instructions . . . . .			<b>13</b>	
<b>14</b> Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .			<b>14</b> ( )	
<b>15</b> <b>Net long-term capital gain or (loss).</b> Combine lines 8a through 14 in column (h). Then, go to Part III on the back . . . . .			<b>15</b>	

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

Schedule D (Form 1040) 2021

**Part III Summary**

<b>16</b>	Combine lines 7 and 15 and enter the result . . . . .	<b>16</b>	334
	<ul style="list-style-type: none"> <li>● If line 16 is a <b>gain</b>, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.</li> <li>● If line 16 is a <b>loss</b>, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.</li> <li>● If line 16 is <b>zero</b>, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.</li> </ul>		
<b>17</b>	Are lines 15 and 16 <b>both</b> gains? <input type="checkbox"/> <b>Yes.</b> Go to line 18. <input checked="" type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.		
<b>18</b>	If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet . . . . . ▶	<b>18</b>	
<b>19</b>	If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet . . . . . ▶	<b>19</b>	
<b>20</b>	Are lines 18 and 19 both zero or blank and are you not filing Form 4952? <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16. <b>Don't</b> complete lines 21 and 22 below.  <input type="checkbox"/> <b>No.</b> Complete the <b>Schedule D Tax Worksheet</b> in the instructions. <b>Don't</b> complete lines 21 and 22 below.		
<b>21</b>	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the <b>smaller</b> of:  <ul style="list-style-type: none"> <li>● The loss on line 16; or</li> <li>● (\$3,000), or if married filing separately, (\$1,500)</li> </ul> <div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; width: 20px; height: 20px; margin-right: 5px;"></div> <div style="flex-grow: 1; border-bottom: 1px dotted black;"></div> <div style="margin-left: 5px;">▶</div> </div>	<b>21</b>	( )
	<b>Note:</b> When figuring which amount is smaller, treat both amounts as positive numbers.		
<b>22</b>	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?  <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16.  <input checked="" type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

**Sales and Other Dispositions of Capital Assets**► Go to [www.irs.gov/Form8949](http://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.

**2021**Attachment  
Sequence No. **12A**

Name(s) shown on return

DAVID C VASQUEZ

SSN or taxpayer identification number

606-05-4563

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 <b>Note</b> 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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMC ENTERTAINMENT HOLDINGS, INC.	01/27/2021	01/27/2021	36	36			
	AMC ENTERTAINMENT HOLDINGS, INC.	02/01/2021	02/01/2021	14	14			
	AMC ENTERTAINMENT HOLDINGS, INC.	02/01/2021	02/01/2021	14	14			
	AMAZON.COM, INC. COMMON STOCK	02/08/2021	04/05/2021	3,217	3,356	W	63	-76
	AMAZON.COM, INC. COMMON STOCK	04/05/2021	04/06/2021	1,004	1,043			-39
	AMAZON.COM, INC. COMMON STOCK	04/13/2021	04/14/2021	498	520			-22
	AMAZON.COM, INC. COMMON STOCK	08/02/2021	08/27/2021	496	500			-4
	AMAZON.COM, INC. COMMON STOCK	08/23/2021	08/27/2021	2	2			
	AMAZON.COM, INC. COMMON STOCK	08/23/2021	08/27/2021	1,033	998			35
	AMAZON.COM, INC. COMMON STOCK	10/12/2021	10/15/2021					
	AMAZON.COM, INC. COMMON STOCK	10/12/2021	10/15/2021	519	500			19
	APPLE INC. COMMON STOCK	01/07/2021	01/08/2021	657	652			5
	APPLE INC. COMMON STOCK	01/29/2021	01/29/2021	664	662			2
	APPLE INC. COMMON STOCK	02/26/2021	03/02/2021	642	621			21
<b>2 Totals.</b> Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if <b>Box A</b> above is checked), line 2 (if <b>Box B</b> above is checked), or line 3 (if <b>Box C</b> above is checked) ►				15,859	15,832		65	92

**Note:** If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

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

Form **8949** (2021)

**Sales and Other Dispositions of Capital Assets**▶ Go to [www.irs.gov/Form8949](http://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.****2021**Attachment  
Sequence No. **12A**

Name(s) shown on return

DAVID C VASQUEZ

SSN or taxpayer identification number

606-05-4563

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 <b>Note</b> 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.		(h) <b>Gain or (loss).</b> Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	APPLE INC. COMM ON STOCK	03/09 /2021	03/11 2021	609	596			13
	APPLE INC. COMM ON STOCK	03/30 /2021	03/31 2021	617	600			17
	APPLE INC. COMM ON STOCK	10/19 /2021	10/28 2021	763	735			28
	STARBUCKS CORPO RATION COMMON S TICK	01/07 /2021	01/08 2021	1,050	1,036			14
	STARBUCKS CORPO RATION COMMON S TICK	01/27 /2021	01/28 2021	497	491			6
	STARBUCKS CORPO RATION COMMON S TICK	01/29 /2021	01/29 2021	482	483			-1
	STARBUCKS CORPO RATION COMMON S TICK	02/01 /2021	02/02 2021	512	497			15
	STARBUCKS CORPO RATION COMMON S TICK	02/01 /2021	02/02 2021	512	485			27
	STARBUCKS CORPO RATION COMMON S TICK	08/23 /2021	08/27 2021	115	115			
	STARBUCKS CORPO RATION COMMON S TICK	10/05 /2021	10/06 2021	560	555			5
	STARBUCKS CORPO RATION COMMON S TICK	10/29 /2021	11/02 2021	557	536			21
	STARBUCKS CORPO RATION COMMON S TICK	10/14 /2021	11/02 2021	557	562	W	2	-3
	STARBUCKS CORPO RATION COMMON S TICK	11/11 /2021	12/09 2021	232	223			9
<b>2 Totals.</b> Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, <b>line 1b</b> (if <b>Box A</b> above is checked), <b>line 2</b> (if <b>Box B</b> above is checked), or <b>line 3</b> (if <b>Box C</b> above is checked) ▶								

**Note:** If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

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

Form **8949** (2021)

**Sales and Other Dispositions of Capital Assets**► Go to [www.irs.gov/Form8949](http://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.

**2021**Attachment  
Sequence No. **12A**

Name(s) shown on return

DAVID C VASQUEZ

SSN or taxpayer identification number

606-05-4563

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 <b>Note</b> 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.		(h) <b>Gain or (loss).</b> Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	bitcoin crypto	04/26 /2021	11/08 2021	9,468	9,226			242
<b>2 Totals.</b> Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if <b>Box A</b> above is checked), line 2 (if <b>Box B</b> above is checked), or line 3 (if <b>Box C</b> above is checked) ►				9,468	9,226		0	242

**Note:** If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

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

Form **8949** (2021)

**Education Credits**  
**(American Opportunity and Lifetime Learning Credits)**

▶ Attach to Form 1040 or 1040-SR.

▶ Go to [www.irs.gov/Form8863](http://www.irs.gov/Form8863) for instructions and the latest information.**2021**Attachment  
Sequence No. **50**

Name(s) shown on return

DAVID C VASQUEZ

Your social security number

606-05-4563

**CAUTION****Complete a separate Part III on page 2 for each student for whom you're claiming either credit before you complete Parts I and II.****Part I Refundable American Opportunity Credit**

<b>1</b>	After completing Part III for each student, enter the total of all amounts from all Parts III, line 30	<b>1</b>	
<b>2</b>	Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying widow(er)	<b>2</b>	
<b>3</b>	Enter the amount from Form 1040 or 1040-SR, line 11. If you're filing Form 2555 or 4563, or you're excluding income from Puerto Rico, see Pub. 970 for the amount to enter.	<b>3</b>	
<b>4</b>	Subtract line 3 from line 2. If zero or less, <b>stop</b> ; you can't take any education credit	<b>4</b>	
<b>5</b>	Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	<b>5</b>	
<b>6</b>	If line 4 is: • Equal to or more than line 5, enter 1.000 on line 6 • Less than line 5, divide line 4 by line 5. Enter the result as a decimal (rounded to at least three places)	<b>6</b>	
<b>7</b>	Multiply line 1 by line 6. <b>Caution:</b> If you were under age 24 at the end of the year <b>and</b> meet the conditions described in the instructions, you <b>can't</b> take the refundable American opportunity credit; skip line 8, enter the amount from line 7 on line 9, and check this box <input type="checkbox"/>	<b>7</b>	
<b>8</b>	<b>Refundable American opportunity credit.</b> Multiply line 7 by 40% (0.40). Enter the amount here and on Form 1040 or 1040-SR, line 29. Then go to line 9 below	<b>8</b>	

**Part II Nonrefundable Education Credits**

<b>9</b>	Subtract line 8 from line 7. Enter here and on line 2 of the Credit Limit Worksheet (see instructions)	<b>9</b>	
<b>10</b>	After completing Part III for each student, enter the total of all amounts from all Parts III, line 31. If zero, skip lines 11 through 17, enter -0- on line 18, and go to line 19	<b>10</b>	5,095
<b>11</b>	Enter the smaller of line 10 or \$10,000	<b>11</b>	5,095
<b>12</b>	Multiply line 11 by 20% (0.20)	<b>12</b>	1,019
<b>13</b>	Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying widow(er)	<b>13</b>	90,000
<b>14</b>	Enter the amount from Form 1040 or 1040-SR, line 11. If you're filing Form 2555 or 4563, or you're excluding income from Puerto Rico, see Pub. 970 for the amount to enter	<b>14</b>	48,428
<b>15</b>	Subtract line 14 from line 13. If zero or less, skip lines 16 and 17, enter -0- on line 18, and go to line 19	<b>15</b>	41,572
<b>16</b>	Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	<b>16</b>	10,000
<b>17</b>	If line 15 is: • Equal to or more than line 16, enter 1.000 on line 17 and go to line 18 • Less than line 16, divide line 15 by line 16. Enter the result as a decimal (rounded to at least three places)	<b>17</b>	1.000
<b>18</b>	Multiply line 12 by line 17. Enter here and on line 1 of the Credit Limit Worksheet (see instructions) ▶	<b>18</b>	1,019
<b>19</b>	<b>Nonrefundable education credits.</b> Enter the amount from line 7 of the Credit Limit Worksheet (see instructions) here and on Schedule 3 (Form 1040), line 3	<b>19</b>	1,019

**For Paperwork Reduction Act Notice, see your tax return instructions.**Form **8863** (2021)



Name(s) shown on return  
DAVID C VASQUEZ

Your social security number  
606-05-4563



**Complete Part III for each student for whom you're claiming either the American opportunity credit or lifetime learning credit. Use additional copies of page 2 as needed for each student.**

**Part III Student and Educational Institution Information.** See instructions.

<p><b>20</b> Student name (as shown on page 1 of your tax return) DAVID C VASQUEZ</p>	<p><b>21</b> Student social security number (as shown on page 1 of your tax return) 606-05-4563</p>		
<p><b>22</b> Educational institution information (see instructions)</p> <table style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><b>a.</b> Name of first educational institution Oregon State University</p> <p><b>(1)</b> Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions. PO Box 1086 Corvallis OR 97339</p> <p><b>(2)</b> Did the student receive Form 1098-T from this institution for 2021? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(3)</b> Did the student receive Form 1098-T from this institution for 2020 with box 7 checked? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(4)</b> Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in <b>(2)</b> or <b>(3)</b>. You can get the EIN from Form 1098-T or from the institution. 61-1730089</p> </td> <td style="width: 50%; vertical-align: top;"> <p><b>b.</b> Name of second educational institution (if any)</p> <p><b>(1)</b> Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p><b>(2)</b> Did the student receive Form 1098-T from this institution for 2021? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(3)</b> Did the student receive Form 1098-T from this institution for 2020 with box 7 checked? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(4)</b> Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in <b>(2)</b> or <b>(3)</b>. You can get the EIN from Form 1098-T or from the institution.</p> </td> </tr> </table>		<p><b>a.</b> Name of first educational institution Oregon State University</p> <p><b>(1)</b> Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions. PO Box 1086 Corvallis OR 97339</p> <p><b>(2)</b> Did the student receive Form 1098-T from this institution for 2021? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(3)</b> Did the student receive Form 1098-T from this institution for 2020 with box 7 checked? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(4)</b> Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in <b>(2)</b> or <b>(3)</b>. You can get the EIN from Form 1098-T or from the institution. 61-1730089</p>	<p><b>b.</b> Name of second educational institution (if any)</p> <p><b>(1)</b> Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p><b>(2)</b> Did the student receive Form 1098-T from this institution for 2021? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(3)</b> Did the student receive Form 1098-T from this institution for 2020 with box 7 checked? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(4)</b> Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in <b>(2)</b> or <b>(3)</b>. You can get the EIN from Form 1098-T or from the institution.</p>
<p><b>a.</b> Name of first educational institution Oregon State University</p> <p><b>(1)</b> Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions. PO Box 1086 Corvallis OR 97339</p> <p><b>(2)</b> Did the student receive Form 1098-T from this institution for 2021? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(3)</b> Did the student receive Form 1098-T from this institution for 2020 with box 7 checked? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(4)</b> Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in <b>(2)</b> or <b>(3)</b>. You can get the EIN from Form 1098-T or from the institution. 61-1730089</p>	<p><b>b.</b> Name of second educational institution (if any)</p> <p><b>(1)</b> Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p><b>(2)</b> Did the student receive Form 1098-T from this institution for 2021? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(3)</b> Did the student receive Form 1098-T from this institution for 2020 with box 7 checked? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>(4)</b> Enter the institution's employer identification number (EIN) if you're claiming the American opportunity credit or if you checked "Yes" in <b>(2)</b> or <b>(3)</b>. You can get the EIN from Form 1098-T or from the institution.</p>		
<p><b>23</b> Has the Hope Scholarship Credit or American opportunity credit been claimed for this student for any 4 tax years before 2021? <input type="checkbox"/> Yes -- <b>Stop!</b> Go to line 31 for this student. <input checked="" type="checkbox"/> No -- Go to line 24.</p>			
<p><b>24</b> Was the student enrolled at least half-time for at least one academic period that began or is treated as having begun in 2021 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credential? See instructions. <input checked="" type="checkbox"/> Yes -- Go to line 25. <input type="checkbox"/> No -- <b>Stop!</b> Go to line 31 for this student.</p>			
<p><b>25</b> Did the student complete the first 4 years of postsecondary education before 2021? See instructions. <input checked="" type="checkbox"/> Yes -- <b>Stop!</b> Go to line 31 for this student. <input type="checkbox"/> No -- Go to line 26.</p>			
<p><b>26</b> Was the student convicted, before the end of 2021, of a felony for possession or distribution of a controlled substance? <input type="checkbox"/> Yes -- <b>Stop!</b> Go to line 31 for this student. <input type="checkbox"/> No -- Complete lines 27 through 30 for this student.</p>			



You **can't** take the American opportunity credit and the lifetime learning credit for the **same student** in the same year. If you complete lines 27 through 30 for this student, don't complete line 31.

**American Opportunity Credit**

<b>27</b> Adjusted qualified education expenses (see instructions). <b>Don't enter more than \$4,000.</b> .....	<b>27</b>	
<b>28</b> Subtract \$2,000 from line 27. If zero or less, enter -0- .....	<b>28</b>	0
<b>29</b> Multiply line 28 by 25% (0.25) .....	<b>29</b>	
<b>30</b> If line 28 is zero, enter the amount from line 27. Otherwise, add \$2,000 to the amount on line 29 and enter the result. Skip line 31. Include the total of all amounts from all Parts III, line 30, on Part I, line 1 .....	<b>30</b>	

**Lifetime Learning Credit**

<b>31</b> Adjusted qualified education expenses (see instructions). Include the total of all amounts from all Parts III, line 31, on Part II, line 10 .....	<b>31</b>	5,095
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## 2021 WAGES AND SALARIES SUMMARY ATTACHMENT

DAVID C VASQUEZ  
606-05-4563

Employer Name	Employer EIN	T or S	Wages	Federal Withholding	Social Security Tax Withheld	State	State Wages	State Tax Withheld	Local Tax Withheld
OREGON STATE UNIVERSITY	61-1730890	T	10,584	447		OR	10,584	550	
TEKSYSTEMS INC	52-2010575	T	37,732	5,961	2,339	OR	37,732	2,924	

Total	48,316	6,408	2,339	48,316	3,474
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## 2021 FEDERAL TAX WITHHOLDINGS ATTACHMENT

DAVID C VASQUEZ  
606-05-4563

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W-2	OREGON STATE UNIVERSITY	447
W-2	TEKSYSTEMS INC	5,961

Total to Form 1040/1040-SR line 25d	6,408
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## 2021 SCHEDULE A - STATE AND LOCAL TAX ATTACHMENT

DAVID C VASQUEZ  
606-05-4563

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OR W2 W/H FROM OREGON STATE UNIVERSITY	550
OR W2 W/H FROM TEKSYSTEMS INC	2,924

TOTAL TO SCHEDULE A LINE 5A

3,474

## 2021 RECOVERY REBATE CREDIT WORKSHEET – LINE 30

DAVID C VASQUEZ  
606-05-4563

**Before you begin:** ✓ See the instructions for line 30 to find out if you can take this credit and for definitions and other information needed to fill out this worksheet.  
✓ If you received Notice 1444-C, have it available.  
Don't include on line 13 any amount you received but later returned to the IRS.  
If you can't take the recovery rebate credit, you don't have to repay any amount of EIP 3 on Form 1040 or 1040-SR.

1. Can you be claimed as a dependent on another person's 2021 return? If filing a joint return, go to line 2.  
☒ **No.** Go to line 2.  
☐ **Yes.** **STOP** You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.
2. Does your 2021 return include a social security number that was issued on or before the due date of your 2021 return (including extensions) for you and, if filing a joint return, your spouse?  
☒ **Yes.** Go to line 6.  
☐ **No.** If you are filing a joint return, go to line 3. If you aren't filing a joint return, go to line 5.
3. Was at least one of you a member of the U.S. Armed Forces at any time during 2021, and does at least one of you have a social security number that was issued on or before the due date of your 2021 return (including extensions)?  
☐ **Yes.** Your credit is not limited. Go to line 6.  
☐ **No.** Go to line 4.
4. Does one of you have a social security number that was issued on or before the due date of your 2021 return (including extensions)?  
☐ **Yes.** Your credit is limited. Go to line 6.  
☐ **No.** Go to line 5.
5. Do you have any dependents listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you entered a social security number that was issued on or before the due date of your 2021 return (including extensions) or an adoption taxpayer identification number?  
☐ **Yes.** Enter zero on line 6 and go to line 7.  
☐ **No.** **STOP** You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.
6. Enter:
  - \$1,400 if single, head of household, married filing separately, or qualifying widow(er),
  - \$1,400 if married filing jointly and you answered "Yes" to question 4, or
  - \$2,800 if married filing jointly and you answered "Yes" to question 2 or 36. 0
7. Multiply \$1,400 by the number of dependents listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you entered a social security number that was issued on or before the due date of your 2021 return (including extensions) or an adoption taxpayer identification number 7. \_\_\_\_\_
8. Add lines 6 and 7 8. \_\_\_\_\_
9. Is the amount on line 11 of Form 1040 or 1040-SR more than the amount shown below for your filing status?
  - Single or Married filing separately – \$75,000
  - Married filing jointly or qualifying widow(er) – \$150,000
  - Head of household – \$112,500☐ **Yes.** Enter the amount from line 11 of Form 1040 or 1040-SR and go to line 10  
☐ **No.** Enter the amount from line 8 on line 12 and skip lines 10 and 11 9. \_\_\_\_\_
10. Is line 9 more than the amount shown below for your filing status?
  - Single or married filing separately – \$80,000
  - Married filing jointly or qualifying widow(er) – \$160,000
  - Head of household – \$120,000☐ **Yes.** **STOP** You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.  
☐ **No.** Subtract line 9 from the amount shown above for your filing status 10. \_\_\_\_\_
11. Divide line 10 by the amount shown below for your filing status. Enter the result as a decimal (rounded to at least 2 places).
  - Single or married filing separately – \$5,000
  - Married filing jointly or qualifying widow(er) – \$10,000
  - Head of household – \$7,50011. \_\_\_\_\_
12. Multiply line 8 by line 11 12. \_\_\_\_\_
13. Enter the amount, if any, of EIP 3 that was issued to you. If filing a joint return, include the amount, if any, or your spouse's EIP 3. You may refer to Notice 1444-C or your tax account information at IRS.gov/Account for the amount to enter here 13. \_\_\_\_\_
14. **Recovery rebate credit.** Subtract line 13 from line 12. If zero or less, enter -0-. If line 13 is more than line 12, you don't have to pay back the difference. Enter the result here and, if more than zero, on line 30 of Form 1040 or 1040-SR 14. 0

## 2021 Education Expense Worksheet

DAVID C VASQUEZ  
606-05-4563

Keep for Your Records

Student name ..... DAVID C VASQUEZ  
Education type .....  
Type of education benefit ..... Lifetime Learning Credit

A. Eligible Institution	B. Payments rcvd for qualified tuition & related exp	C. Amts billed for qualified tuition & related exp	D. Amts actually paid during Tax Year	E. Scholarships or grants	F. Taxable scholarships/grants
Oregon State Universit	5,095				
<b>Total</b>	5,095				

Note: Amounts should be entered in Column B from Box 1 of 1098-T or total amounts paid to institutions that did not issue form 1098-T or Columns C and D. Amounts entered in column C correspond to amounts reported as billed by the institution (Form 1098-T box 2). Actual amounts paid from whatever source(s) of funding used should be reported in column D as the educational benefits are calculated using actual amounts paid, not amounts reported as billed. Amounts from 1098-T box 5 should be reported in Column E. Amounts reported as taxable in column F can be used to reduce the tax free scholarship and grants and allow additional expenses to qualify for the education credits. See IRS Publication 970 for additional details.

### Education Expenses

- |  |    |       |
|--|----|-------|
| 1. Payments received for qualified tuition and related expenses (total from column B above) .....                    | 1. | 5,095 |
| 2. Amounts actually paid during 2021 for qualified tuition and related expenses (total from column D above) .....    | 2. |       |
| 3. Qualified books, supplies, and equipment purchased from education institutions (eligible for Lifetime and AOC) .. | 3. |       |
| 4. Qualified books, supplies, and equipment NOT purchased from education institutions (eligible for AOC only) ....   | 4. |       |
| 5. Room and board .....  | 5. |       |
| 6. Other education expenses .....  | 6. |       |
| 7. Total Education expenses (total of lines 1-6) .....   | 7. | 5,095 |

### Sources of Education Expenses Funding

- |  |     |       |
|--|-----|-------|
| 8. Scholarships or Grants (total from column E above) .....  | 8.  |       |
| 9. Tax free scholarships and grants (not reported on Form 1098-T) .....                                | 9.  |       |
| 10. Taxable scholarships and grants (not reported on Form 1098-T) .....                                | 10. |       |
| 11. Loans .....  | 11. |       |
| 12. Taxpayer/spouse funds .....  | 12. | 5,095 |
| 13. Dependent funds .....  | 13. |       |
| 14. Nontaxable employer tuition assistance .....   | 14. |       |
| 15. Veteran's educational assistance (GI Bill) .....   | 15. |       |
| 16. Coverdell Education Savings Account distributions reported on Form 1099-Q .....                    | 16. |       |
| 17. Qualified Tuition Plan (529 Plan) distributions reported on Form 1099-Q .....                      | 17. |       |
| 18. Series EE/I Savings Bond Interest excluded due to education benefits (reported on Form 8815) ..... | 18. |       |
| 19. Other Sources .....  | 19. |       |
| 20. Total sources of education expense funding (total of lines 8-19) .....                             | 20. | 5,095 |

### Expenses available for Education Credits/Tuition Deduction

	AOC	Lifetime	Tuition Deduction
21. Qualified expenses for American Opportunity Credit (total lines 1-4) or for Lifetime Learning Credit/Tuition Deduction (total lines 1-3) .....	5,095	5,095	
22. Nonqualified expenses (line 7 less line 21) .....			
23. Total tax free education benefits (total lines 8, 9, 14, and 15) .....			
24. Qualified expenses after tax free education benefits (line 21 less line 23) ..	5,095	5,095	
25. Total other tax related education benefits(total lines 16-18) .....			
26. Non-Qualified expenses funded by Other Tax Related benefits (line 22) ..			
27. Net other tax related benefits applied to qualified expenses(25 less 26) ..			
28. Qualified expenses after other tax related benefits (Line 24 less line 27) This amount will be used to calculate the credit or deduction .....	5,095	5,095	

29. Credit/Deduction actually reported on return .... 29. Lifetime Learning Credit ..... 5,095

## 2021 FORM 8863 CREDIT LIMIT WORKSHEET – LINE 19

DAVID C VASQUEZ  
606-05-4563

Keep for Your Records

### NONREFUNDABLE CREDIT WORKSHEET

1. Enter the amount from Form 8863, line 18 ..... 1. 1,019
2. Enter the amount from Form 8863, line 9 ..... 2. \_\_\_\_\_
3. Add lines 1 and 2 ..... 3. 1,019
4. Enter the amount from:  
Form 1040 or 1040-SR, line 18 ..... 4. 4,106
5. Enter the total of your credits from:  
Schedule 3 (Form 1040), lines 1 and 2,  
6d and 6l ..... 5. \_\_\_\_\_
6. Subtract line 5 from line 4 ..... 6. 4,106
7. Enter the smaller of line 3 or line 6 here and on Form 8863, line 19 ..... 7. 1,019

2021 EDUCATION OPTIMIZATION SUMMARY

DAVID C VASQUEZ  
606-05-4563

Keep for Your Records

Optimization has been selected for one or more students in the return. The results are listed below.

Name	Social Security Number	Expense	Type
DAVID C VASQUEZ	606-05-4563	5,095	LIFETIME

PLEASE NOTE:  
Optimization is only calculated at the 1040 Federal level.



# 2021 STUDENT LOAN INTEREST DEDUCTION WORKSHEET – SCHEDULE 1, LINE 21

DAVID C VASQUEZ

Keep for Your Records

- Before you begin:** ✓ Figure any write-in adjustments to be entered on Schedule 1, line 24z (see the instructions for Schedule 1, line 24z).
- ✓ Be sure you have read the **Exception** in the instructions for this line to see if you can use this worksheet instead of Pub. 970 to figure your deduction.

- 
1. Enter the total interest you paid in 2021 on qualified student loans (see instructions for line 21).  
**Don't** enter more than \$2,500 ..... 1. 222
  2. Enter the amount from Form 1040 or 1040-SR, line 9 ..... 2. 48,650
  3. Enter the total of the amounts from Schedule 1, lines 11 through 20, and 23 and 25 ..... 3. \_\_\_\_\_
  4. Subtract line 3 from line 2 ..... 4. 48,650
  5. Enter the amount shown below for your filing status.
    - Single, head of household, or qualifying widow(er) – \$70,000
    - Married filing jointly – \$140,000..... 5. 70,000
  6. Is the amount on line 4 more than the amount on line 5?  
**No.** Skip lines 6 and 7, enter -0- on line 8, and go to line 9.  
**Yes.** Subtract line 5 from line 4 ..... 6. \_\_\_\_\_
  7. Divide line 6 by \$15,000 (\$30,000 if married filing jointly). Enter the result as a decimal (rounded to at least three places). If the result is 1.000 or more, enter 1.000 ..... 7. \_\_\_\_\_
  8. Multiply line 1 by line 7 ..... 8. 0
  9. **Student loan interest deduction.** Subtract line 8 from line 1. Enter the result here and on Schedule 1, line 21. **Don't** include this amount in figuring any other deduction on your return (such as on Schedule A, C, E, etc.) ..... 9. 222

**SCHEDULE D AMT**  
**(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](https://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.**

**FOR AMT PURPOSES ONLY**

**2021**

Attachment  
Sequence No. **12**

Name(s) shown on return

DAVID C VASQUEZ

Your social security number

606-05-4563

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)
<b>1a</b> 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 . . . . .				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .				
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .	15,859	15,832	65	92
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .				
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 . . . . .			<b>4</b>	
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .			<b>5</b>	
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .			<b>6</b> ( )	
<b>7</b> <b>Net short-term capital gain or (loss).</b> 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 page 2 . . . . .			<b>7</b>	92

**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)
<b>8a</b> 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 . . . . .				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .				
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .				
<b>11</b> 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 . . . . .			<b>11</b>	
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .			<b>12</b>	
<b>13</b> Capital gain distributions. See the instructions . . . . .			<b>13</b>	
<b>14</b> Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .			<b>14</b> ( )	
<b>15</b> <b>Net long-term capital gain or (loss).</b> Combine lines 8a through 14 in column (h). Then go to Part III on page 2 . . . . .			<b>15</b>	

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

**Schedule D (Form 1040 or 1040-SR) 2021**

**Part III Summary**

<b>16</b>	Combine lines 7 and 15 and enter the result . . . . .	<b>16</b>	92
	<ul style="list-style-type: none"> <li>● If line 16 is a <b>gain</b>, enter the amount from line 16 on Form 1040 or 1040-SR, or 1040-NR line 7. Then go to line 17 below.</li> <li>● If line 16 is a <b>loss</b>, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.</li> <li>● If line 16 is <b>zero</b>, skip lines 17 through 21 below and enter -0- on Form 1040 or 1040-SR, or 1040-NR, line 7. Then go to line 22.</li> </ul>		
<b>17</b>	Are lines 15 and 16 <b>both</b> gains? <input type="checkbox"/> <b>Yes.</b> Go to line 18. <input checked="" type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.		
<b>18</b>	If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet . . . . . ▶	<b>18</b>	
<b>19</b>	If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet . . . . . ▶	<b>19</b>	
<b>20</b>	Are lines 18 and 19 both zero or blank and are you not filing Form 4952? <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16. <b>Don't</b> complete lines 21 and 22 below.  <input type="checkbox"/> <b>No.</b> Complete the <b>Schedule D Tax Worksheet</b> in the instructions. <b>Don't</b> complete lines 21 and 22 below.		
<b>21</b>	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the <b>smaller</b> of:  <ul style="list-style-type: none"> <li>● The loss on line 16; or</li> <li>● (\$3,000), or if married filing separately, (\$1,500)</li> </ul> <div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; width: 20px; height: 20px; margin-right: 5px;"></div> <div style="flex-grow: 1; border-bottom: 1px dotted black;"></div> <div style="margin-left: 5px;">▶</div> </div>	<b>21</b>	( )
	<b>Note:</b> When figuring which amount is smaller, treat both amounts as positive numbers.		
<b>22</b>	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?  <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16.  <input checked="" type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR or 1040-NR.		

**Sales and Other Dispositions of Capital Assets**▶ Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.▶ **File with your Schedule D** to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Name(s) shown on return

DAVID C VASQUEZ

SSN or taxpayer identification number

606-05-4563

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 <b>Note</b> 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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMC ENTERTAINMENT HOLDINGS, INC.	01/27/2021	01/27/2021	36	36			
	AMC ENTERTAINMENT HOLDINGS, INC.	02/01/2021	02/01/2021	14	14			
	AMC ENTERTAINMENT HOLDINGS, INC.	02/01/2021	02/01/2021	14	14			
	AMAZON.COM, INC. COMMON STOCK	02/08/2021	04/05/2021	3,217	3,356	W	63	-76
	AMAZON.COM, INC. COMMON STOCK	04/05/2021	04/06/2021	1,004	1,043			-39
	AMAZON.COM, INC. COMMON STOCK	04/13/2021	04/14/2021	498	520			-22
	AMAZON.COM, INC. COMMON STOCK	08/02/2021	08/27/2021	496	500			-4
	AMAZON.COM, INC. COMMON STOCK	08/23/2021	08/27/2021	2	2			
	AMAZON.COM, INC. COMMON STOCK	08/23/2021	08/27/2021	1,033	998			35
	AMAZON.COM, INC. COMMON STOCK	10/12/2021	10/15/2021					
	AMAZON.COM, INC. COMMON STOCK	10/12/2021	10/15/2021	519	500			19
	APPLE INC. COMMON STOCK	01/07/2021	01/08/2021	657	652			5
	APPLE INC. COMMON STOCK	01/29/2021	01/29/2021	664	662			2
	(See attached)							
<b>2 Totals.</b> Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if <b>Box A</b> above is checked), line 2 (if <b>Box B</b> above is checked), or line 3 (if <b>Box C</b> above is checked) ▶				15,859	15,832		65	92

**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.

**Sales and Other Dispositions of Capital Assets**▶ Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.▶ **File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.**

Name(s) shown on return

DAVID C VASQUEZ

SSN or taxpayer identification number

606-05-4563

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 <b>Note</b> 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.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	APPLE INC. COMM ON STOCK	02/26 /2021	03/02 2021	642	621			21
	APPLE INC. COMM ON STOCK	03/09 /2021	03/11 2021	609	596			13
	APPLE INC. COMM ON STOCK	03/30 /2021	03/31 2021	617	600			17
	APPLE INC. COMM ON STOCK	10/19 /2021	10/28 2021	763	735			28
	STARBUCKS CORPO RATION COMMON S TICK	01/07 /2021	01/08 2021	1,050	1,036			14
	STARBUCKS CORPO RATION COMMON S TICK	01/27 /2021	01/28 2021	497	491			6
	STARBUCKS CORPO RATION COMMON S TICK	01/29 /2021	01/29 2021	482	483			-1
	STARBUCKS CORPO RATION COMMON S TICK	02/01 /2021	02/02 2021	512	497			15
	STARBUCKS CORPO RATION COMMON S TICK	02/01 /2021	02/02 2021	512	485			27
	STARBUCKS CORPO RATION COMMON S TICK	08/23 /2021	08/27 2021	115	115			
	STARBUCKS CORPO RATION COMMON S TICK	10/05 /2021	10/06 2021	560	555			5
	STARBUCKS CORPO RATION COMMON S TICK	10/29 /2021	11/02 2021	557	536			21
	STARBUCKS CORPO RATION COMMON S TICK	10/14 /2021	11/02 2021	557	562	W	2	-3
	STARBUCKS CORPO RATION COMMON S TICK	11/11 /2021	12/09 2021	232	223			9
<b>2 Totals.</b> Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if <b>Box A</b> above is checked), line 2 (if <b>Box B</b> above is checked), or line 3 (if <b>Box C</b> above is checked) ▶				15,859	15,832		65	92

**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.

## 2021 INVESTMENT INCOME WORKSHEET FOR EIC

DAVID C VASQUEZ  
606-05-4563

Keep for Your Records  
Publication 596

Use this worksheet to figure investment income for the earned income credit when you file Form 1040.

### Interest and Dividends

1. Enter any amount from Form 1040, line 2b ..... 1. \_\_\_\_\_
2. Enter any amount from Form 1040, line 2a, plus any amount on Form 8814, line 1b ..... 2. \_\_\_\_\_
3. Enter any amount from Form 1040, line 3b ..... 3. \_\_\_\_\_
4. Enter the amount from Schedule 1 (Form 1040), line 21, that is from Form 8814 if you are filing that form to report your child's interest and dividend income on your return. (If your child received an Alaska Permanent Fund dividend, use Worksheet 2 to figure the amount to enter on this line.) ..... 4. \_\_\_\_\_

### Capital Gain Net Income

5. Enter the amount from Schedule 1 (Form 1040), line 13. If the amount on that line is a loss, enter -0- ..... 5. 334
6. Enter any gain from Form 4797, Sales of Business Property, line 7. If the amount on that line is a loss, enter -0-. (But, if you completed lines 8 and 9 of Form 4797, enter the amount from line 9 instead.) ..... 6. 0
7. Subtract line 6 of this worksheet from line 5 of this worksheet. (If the result is less than zero, enter -0-.) ..... 7. 334

### Royalties and Rental Income from Personal Property

8. Enter any royalty income from Schedule E, line 23b, plus any income from the rental of personal property shown on Schedule 1 (Form 1040), line 21 ..... 8. \_\_\_\_\_
9. Enter any expenses from Schedule E, line 20, related to royalty income, plus any expenses from the rental of personal property deducted on Schedule 1 (Form 1040), line 36 ..... 9. \_\_\_\_\_
10. Subtract the amount on line 9 of this worksheet from the amount on line 8. (If the result is less than zero, enter -0-.) ..... 10. 0

### Passive Activities

11. Enter the total of any net income from passive activities (such as income included on Schedule E, lines 26, 29a (col. (g)), 34a (col. (d)), or 40; or an ordinary gain identified as "FPA" on Form 4797, line 10). (See instructions below for lines 11 and 12.) ..... 11. \_\_\_\_\_
12. Enter the total of any losses from passive activities (such as losses included on Schedule E, lines 26, 29b (col. (f)), 34b (col. (c)), or 40; or an ordinary loss identified as "PAL" on Form 4797, line 10). (See instructions below for lines 11 and 12.) ..... 12. 0
13. Combine the amounts on lines 11 and 12 of this worksheet. (If the result is less than zero, enter -0-.) ..... 13. \_\_\_\_\_
14. Add the amounts on lines 1, 2, 3, 4, 7, 10, and 13. Enter the total. **This is your investment income.** ..... 14. 334
15. Is the amount on line 14 more than **\$10,000**?  
☐ **Yes.** You cannot take the credit.  
☒ **No.** Go to Step 3 of the Form 1040 instructions for line 17a to find out if you can take the credit (unless you are using this publication to find out if you can take the credit; in that case, go to Rule 7, next.)

**Instructions for lines 11 and 12.** In figuring the amount to enter on lines 11 and 12, do not take into account any royalty income (or loss) included on line 26 of Schedule E or any income (or loss) included in your earned income or on line 1, 2, 3, 4, 7, or 10 of this worksheet. To find out if the income on line 26 of Schedule E is from a passive activity, see the Schedule E instructions. If any of the rental real estate income (or loss) included on Schedule E, line 26, is not from a passive activity, print "NPA" and the amount of that income (or loss) on the dotted line next to line 26.

## 2022 CARRYFORWARD INFORMATION

DAVID C VASQUEZ  
606-05-4563

**Keep for Your Records**

Itemized Returns Only – 2021 state and local tax refund (this amount may not be taxable in 2022) .....	
Charitable contributions carryover to 2022 .....	
Estimated short-term capital loss carryover .....	
Estimated long-term capital loss carryover .....	
2021 tax liability (for 2022 Form 2210 purposes) .....	3,087
Form 8839: 2021 carryover of unqualified expenses .....	
Refund amount applied to 2022 .....	
Disallowed investment interest in 2021 .....	
Additional state taxes paid .....	
Form 8396: Mortgage interest credit from 2019 .....	
Mortgage interest credit from 2020 .....	
Mortgage interest credit from 2021 .....	
Form 8801: Minimum tax credit carryforward .....	0
Potential 2022 IRA contribution from 2021 tax refund .....	

NOL carryforward:				Regular Tax	AMT Tax
from 2001		from 2011		from 2001	
from 2002		from 2012		from 2002	
from 2003		from 2013		from 2003	
from 2004		from 2014		from 2004	
from 2005		from 2015		from 2005	
from 2006		from 2016		from 2006	
from 2007		from 2017		from 2007	
from 2008		from 2018		from 2008	
from 2009		from 2019		from 2009	
from 2010		from 2020		from 2010	
Gross NOL generated in 2021 .....				Gross AMT NOL generated in 2021 .....	
To be absorbed in carryback period ....				To be absorbed in carryback period ....	
Net carryforward from 2021 .....				Net carryforward from 2021 .....	
Total carryforward to 2022 .....				Total carryforward to 2022 .....	

- The amounts carried to next year from Schedule(s) E, pages 1 and/or 2, are found on Form 8582, Worksheet 6. Carryover AMT amounts are found on the AMT Form 8582, Worksheet 6.
- Foreign Tax Credit carryforward to 2022 .....
- General Business Credit carryforward to 2022 .....
- First-Time Homebuyer Credit Repayment carryforward to 2022 .....
- If there are Form(s) 6252 in this tax return, the gross profit ratio and prior payments received (including the current year payments) will carry forward from each Form 6252.
- Amounts from Form 6251, lines 16 through 18, lines 27 and 28 are automatically carried forward to 2022.

OREGON DEPT OF REVENUE

P.O. BOX 14950  
SALEM, OR 97309

---

Fold here for #10 envelope

OREGON DEPT OF REVENUE

P.O. BOX 14950  
SALEM, OR 97309

---

Fold here for 6x9 envelope

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Fold here for #10 envelope



**2021 Form OR-40**  
**Oregon Individual Income Tax Return for Full-year Residents**

Oregon Department of Revenue

Page 1 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Fiscal year ending date (MM/DD/YYYY)

Space for 2-D barcode--do not write in box below



- ☐ Amended return.  
If amending for an NOL, tax  
year the NOL was generated:  
NOL tax year (YYYY)
- ☐ Extension filed
- ☐ Form OR-24
- ☐ Federal Form 8379
- ☐ Calculated with "as if" federal return
- ☐ Federal Form 8886
- ☐ Short-year tax election
- ☐ Disaster relief

First name

Initial

Date of birth (MM/DD/YYYY)

DAVID

C

12/03/1979

Last name

VASQUEZ

Social Security number (SSN)

606-05-4563

- ☐ First time using this SSN (see instructions) ☐ Applied for ITIN ☐ Deceased

Spouse's first name

Initial

Spouse's date of birth (MM/DD/YYYY)

Spouse's last name

Spouse's Social Security number (SSN)

- ☐ First time using this SSN (see instructions) ☐ Applied for ITIN ☐ Deceased

Current address

155 NW KINGS BLVD

City

State

ZIP code

CORVALLIS

OR

97330

Country

Phone

925-818-1175

**Filing Status** (check only one box)

1. ☒ Single      2. ☐ Married filing jointly      3. ☐ Married filing separately (enter spouse's information **above**)
4. ☐ Head of household (with qualifying dependent)      5. ☐ Qualifying widow(er) with dependent child



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Last name

Social Security number (SSN)

VASQUEZ

606-05-4563

**Note: Reprint page 1 if you make changes to this page.****Exemptions**

6a. Credits for yourself ..... 6a. 1

Check boxes that apply: ☒ Regular ☐ Severely disabled ☐ Someone else can claim you as a dependent.

6b. Credits for your spouse ..... 6b.

Check boxes that apply: ☐ Regular ☐ Severely disabled ☐ Someone else can claim you as a dependent.**Dependents.**List your dependents in order from youngest to oldest. ☐ If more than three, check this box and include Schedule OR-ADD-DEP.

Dependent 1: First name Initial Dependent 1: Last name

Dependent 1: Date of birth (MM/DD/YYYY) Dependent 1: Social Security number (SSN) Code \*

☐ Dependent 1: Check if child has a qualifying disability

Dependent 2: First name Initial Dependent 2: Last name

Dependent 2: Date of birth (MM/DD/YYYY) Dependent 2: Social Security number (SSN) Code \*

☐ Dependent 2: Check if child has a qualifying disability

Dependent 3: First name Initial Dependent 3: Last name

Dependent 3: Date of birth (MM/DD/YYYY) Dependent 3: Social Security number (SSN) Code \*

☐ Dependent 3: Check if child has a qualifying disability

\*Dependent relationship code (see instructions).

6c. Total number of dependents ..... 6c.

6d. Total number of dependent children with a qualifying disability (see instructions) ..... 6d.

6e. Total exemptions. Add 6a through 6d ..... Total 6e. 1



Page 3 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

VASQUEZ

606-05-4563

**Note: Reprint page 1 if you make changes to this page.****Taxable income**

7. Federal adjusted gross income from federal Form 1040, 1040-SR, and 1040-NR, line 11; or 1040-X, line 1C (see instructions) ..... 7. 48,428.00
8. Total additions from Schedule OR-ASC, Section A ..... 8.
9. Income after additions. Add lines 7 and 8 ..... 9. 48,428.00

**Subtractions**

10. 2021 federal tax liability (see instructions) ..... 10. 3,087.00
11. Social Security amount on federal Form 1040 or 1040-SR, line 6b ..... 11.
12. Oregon income tax refund included in federal income ..... 12.
13. Total subtractions from Schedule OR-ASC, Section B ..... 13.
14. Total subtractions. Add lines 10 through 13 ..... 14. 3,087.00
15. Income after subtractions. Line 9 minus line 14 ..... 15. 45,341.00

**Deductions**

16. **Oregon itemized deductions.** Enter your Oregon itemized deductions from Schedule OR-A, line 23. If you are not itemizing your deductions, enter 0 ..... 16. 0.00
17. **Standard deduction.** Enter your standard deduction (see instructions) ..... 17. 2,350.00
- You were:** 17a. ☐ 65 or older    17b. ☐ Blind    **Your spouse was:** 17c. ☐ 65 or older    17d. ☐ Blind
18. Enter the larger of line 16 or 17 ..... 18. 2,350.00
19. Oregon taxable income. Line 15 minus line 18. If line 18 is more than line 15, enter 0 ..... 19. 42,991.00



Page 4 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

VASQUEZ

606-05-4563

**Note: Reprint page 1 if you make changes to this page.****Oregon tax**20. **Tax** (see instructions) ..... 20. 3,501.00

Check the appropriate box if you're using an alternative method to calculate your tax:

20a. ☐ Schedule OR-FIA-40      20b. ☐ Worksheet FCG      20c. ☐ Schedule OR-PTE-FY

21. Interest on certain installment sales ..... 21.

22. Total tax before credits. Add lines 20 and 21 ..... 22. 3,501.00

**Standard and carryforward credits**

23. Exemption credit. If the amount on line 7 is \$100,000 or less, multiply your total exemptions on line 6e by \$213. Otherwise, see instructions ..... 23. 213.00

24. Political contribution credit. **See limits in instructions.** ..... 24.

25. Total standard credits from Schedule OR-ASC, Section C ..... 25.

26. Total standard credits. Add lines 23 through 25 ..... 26. 213.00

27. Tax minus standard credits. Line 22 minus line 26. If line 26 is more than line 22, enter 0. .... 27. 3,288.00

28. Total carryforward credits claimed this year from Schedule OR-ASC, Section D. Line 28 can't be more than line 27 (see Schedule OR-ASC instructions) ..... 28.

29. Tax after standard and carryforward credits. Line 27 minus line 28 ..... 29. 3,288.00

30. Total credit recaptures claimed this year from Schedule OR-ASC, Section E ..... 30.

31. Tax after credit recaptures. Line 29 plus line 30 ..... 31. 3,288.00



**2021 Form OR-40**  
**Oregon Individual Income Tax Return for Full-year Residents**

Oregon Department of Revenue

Page 5 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

VASQUEZ

606-05-4563

**Note: Reprint page 1 if you make changes to this page.**

**Payments and refundable credits**

32. Oregon income tax withheld. **Include a copy of your Forms W-2 and 1099.** . . . . . 32. 3,474.00
33. Amount applied from your prior year's tax refund . . . . . 33.
34. Estimated tax payments for 2021. **Include all payments you made** before  
filing this return (see instructions). Do not include the amount on line 33 . . . . . 34.
35. Earned income credit (see instructions) . . . . . 35.
36. Kicker (Oregon surplus credit). Enter your kicker credit amount  
(see instructions). **If you elect to donate your kicker to the  
State School Fund, enter 0 and see line 53.** . . . . . 36. 269.00
37. Total refundable credits from Schedule OR-ASC, Section F . . . . . 37.
38. Total payments and refundable credits. Add lines 32 through 37 . . . . . 38. 3,743.00

**Tax to pay or refund**

39. **Overpayment of tax.** If line 31 is **less** than line 38, you overpaid.  
Line 38 minus line 31 . . . . . 39. 455.00
40. **Net tax.** If line 31 is **more** than line 38, you have tax to pay.  
Line 31 minus line 38 . . . . . 40.
41. Penalty and interest for filing or paying late (see instructions) . . . . . 41.
42. Interest on underpayment of estimated tax. **Include Form OR-10.** . . . . . 42.
- Exception number from Form OR-10, line 1 42a. Check box if you annualized: 42b. ☐
43. Total penalty and interest due. Add lines 41 and 42 . . . . . 43.



Page 6 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

VASQUEZ

606-05-4563

**Note: Reprint page 1 if you make changes to this page.****Tax to pay or refund** (continued)**44. Net tax including penalty and interest.**Line 40 plus line 43 . . . . . **This is the amount you owe. 44.****45. Overpayment less penalty and interest.**Line 39 minus line 43 . . . . . **This is your refund. 45.** 455.0046. Estimated tax. Fill in the portion of line 45 you want applied to your open  
estimated tax account. . . . . 46.

47. Charitable checkoff donations from Schedule OR-DONATE, line 30 . . . . . 47.

48. Political party \$3 checkoff . . . . . 48.

Party code: 48a. You 48b. Spouse

49. Oregon 529 college savings plan deposits from Schedule OR-529  
(see instructions) . . . . . 49.50. Total. Add lines 46 through 49. Line 50 can't be more than your  
refund on line 45 . . . . . 50.51. **Net refund.** Line 45 minus line 50 . . . . . **This is your net refund. 51.** 455.00**Direct deposit**52. For direct deposit of your refund, see instructions. Check the box if the final deposit destination is outside the United States: ☐**Type of account:**☐ Checking **or**☐ Savings**Account information:**

Routing number

Account number

**Kicker donation**53. If you elect to donate your kicker to the State School Fund, check this box . . . . . 53a. ☐Complete the kicker worksheet, located in the instructions, and enter the  
amount here. . . . . **This election is irrevocable. 53b.**

Page 7 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

VASQUEZ

Social Security number SSN

606-05-4563

**Note: Reprint page 1 if you make changes to this page.****Sign here.** Under penalty of false swearing, I declare that the information in this return is true, correct, and complete.

Your signature

**X**

Date(MM/DD/YYYY)

Spouse's signature

**X**

Date(MM/DD/YYYY)

Signature of preparer other than taxpayer

**X**

Date(MM/DD/YYYY)

Phone

Preparer license number

Preparer first name

Initial

Preparer last name

Preparer address

City

State

ZIP code

Signing this return does not grant your preparer the right to represent you or make decisions on your behalf. For more information, see the instructions for the Tax Information Authorization and Power of Attorney for Representation form on our website.

**Important:** Include a copy of your federal Form 1040, 1040-SR, 1040-X, or 1040-NR. **We may adjust your return without it.****Pay the amount due** (shown on line 44)

- **Online :** [www.oregon.gov/dor](http://www.oregon.gov/dor).
- **By mail:** Payable to the **Oregon Department of Revenue**. Write "2021 Oregon Form OR-40" and the last four digits of your SSN or ITIN on your check or money order. Include your payment with this return. **Don't** use Form OR-40-V payment voucher if you're mailing payment with your return.

**Mail your return**

- **Non-2-D barcode.** If the large 2-D barcode box on the first page of this form is blank:
  - Mail **tax-due** returns to: Oregon Department of Revenue, PO Box 14555, Salem OR 97309-0940.
  - Mail **refund and no-tax-due** returns to: Oregon Department of Revenue, PO Box 14700, Salem OR 97309-0930.
- **2-D barcode.** If the large 2-D barcode box on the first page of this form is filled in:
  - Mail **tax-due** returns to: Oregon Department of Revenue, PO Box 14720, Salem OR 97309-0463.
  - Mail **refund and no-tax-due** returns to: Oregon Department of Revenue, PO Box 14710, Salem OR 97309-0460.



Page 8 of 8 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

VASQUEZ

606-05-4563

**Note: Reprint page 1 if you make changes to this page.**

**Amended statement.** Complete this Section only if you're amending your 2021 return or filing with a new SSN.

If filing an amended return, use this space to explain what you're changing. Include the return line numbers and the reason for each change. If your filing status has changed, explain why. Include all supporting forms and schedules when you file your amended return, even if you haven't changed anything on them.

If filing with a new SSN, enter your former identification number.





## 2021 OREGON FEDERAL TAX LIABILITY SUBTRACTION WORKSHEET

VASQUEZ  
606-05-4563

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- |   |     |                   |
|---|-----|-------------------|
| 1. Enter your federal tax liability .....   | 1.  | <u>3,087</u>      |
| 2. Enter the amount of your nonrefundable CTC, if any, from Form 1040, line 19. Otherwise, enter \$0. ....  | 2.  | <u>          </u> |
| 3. Add lines 1 and 2. ....  | 3.  | <u>3,087</u>      |
| 4. Enter your federal excess advance premium credit .....   | 4.  | <u>          </u> |
| 5. Line 3 minus line 4. (if less than -0- enter -0-). ....  | 5.  | <u>3,087</u>      |
| 6. Enter the total of any other taxes, plus any additions to tax that include only income tax, such as tax credit recaptures, from Form 1040, Schedule 2, lines 8, 10,* 16, and 17. Include any tax on non-effectively connected income from Form 1040-NR, line 23a. .... | 6.  | <u>          </u> |
| 7. Add lines 5 and 6 .....  | 7.  | <u>3,087</u>      |
| 8. Child tax credit* (Schedule 8812, line 14e). ....  | 8.  | <u>          </u> |
| 9. Enter your federal American opportunity credit .....   | 9.  | <u>          </u> |
| 10. Enter any 2021 federal economic stimulus payments you received in 2021 plus your recovery rebate credit, if any, from Form 1040 or 1040-SR, line 30. ....   | 10. | <u>          </u> |
| 11. Enter your total premium tax credit from Form 8962, line 24. ....   | 11. | <u>          </u> |
| 12. Enter your credit for child and dependent care expenses from Form 1040, Schedule 3, line 13g. ....  | 12. | <u>          </u> |
| 13. Add lines 8 through 12. ....  | 13. | <u>          </u> |
| 14. Line 7 minus line 13. (If less than \$0, enter \$0). ....   | 14. | <u>3,087</u>      |
| 15. Maximum subtraction amount from Table 5. ....   | 15. | <u>7,050</u>      |
| 16. Enter the smaller of line 14 or line 15 here and on Form 40; or Form 40N or 40P. ....   | 16. | <u>3,087</u>      |

## 2021 OREGON SURPLUS CREDIT WORKSHEET

VASQUEZ  
606-05-4563

Keep for Your Records

### Part A – Total personal income tax liability and kicker

Taxpayer / Joint (Part A only) Spouse

- |  |    |                             |                             |
|--|----|-----------------------------|-----------------------------|
| 1. Tax before credits reported on your prior year return.  | 1. | <u>1,552</u>                | <u>                    </u> |
| 2. Credit for income taxes paid to another state reported as code 802 and 815 on your prior year Schedule OR-ASC or OR-ASC-NP. | 2. | <u>                    </u> | <u>                    </u> |
| 3. Total prior year tax before credits and after income taxes paid to another state (subtract line 2 from line 1).             | 3. | <u>1,552</u>                | <u>                    </u> |
| 4. Line 3 multiplied by 0.17341.   | 4. | <u>269</u>                  | <u>                    </u> |

### Part B – Prorated Kicker

- |   |    |                |                             |
|---|----|----------------|-----------------------------|
| 5. Federal AGI for prior year.                          | 5. | <u>26,970</u>  | <u>                    </u> |
| 6. Taxpayers share of prior year AGI.                   | 6. | <u>100</u>     | <u>                    </u> |
| 7. Line 6 divided by line 5. Round to 2 decimal places. | 7. | <u>1.00000</u> | <u>                    </u> |
| 8. Line 4 times line 7. This is your prorated kicker.   | 8. | <u>269</u>     | <u>                    </u> |

### Part C – Combined Kicker

- |  |     |                             |                             |
|--|-----|-----------------------------|-----------------------------|
| 9. Kicker amount from taxpayers Part A (or prorated Kicker if Part B completed). | 9.  | <u>                    </u> | <u>269</u>                  |
| 10. Kicker amount from spouses Part A (or prorated Kicker if Part B completed).  | 10. | <u>                    </u> | <u>                    </u> |
| 11. Line 9 plus line 10. This is your combined kicker.                           | 11. | <u>                    </u> | <u>269</u>                  |

Amended Statement

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