

24

(T) EWALL JR, THOMAS H

(S) EWALL, AMELIA T

1370 CENTER DR APT 9  
PARK CITY , UT 84098

Return Status : Pending Signatures



OFFICE NUMBER: 7088

## CONFIDENTIAL CLIENT INFORMATION

## TAXPAYER

THOMAS H EWALL JR

Cell

BEST TIME TO CALL:

(T)SSN/DOB

E-MAIL ADDRESS:

FILING STATUS:

ONLINE RETURN:

FED EFILE SETTLEMENT:

STATE EFILE SETTLEMENT:

(972)757-1305

Anytime

556-88-7326 / 12/09/1958

EWALLT@YAHOO.COM

MarriedFilingJointly

Approve Online | Self Select PIN

IRS Refund | check

See General

## TAX PREPARER

Holly Steinhoff

702341

TAX PREP START DATE:

04-10-2025

TAX PREP FINISH DATE:

04-10-2025

NEW or RETURNING:

Returning

RETURNS PREPARED:

Federal

1040

State/City

UT

E-SIGNED DOCUMENTS:

No

Applied Refund Advance:

NA

## BLOCK FEES

RETURN PREP FEE : \$324.00

OTHER FEE(s) : \$0.00\*

Total Fees: \$324.00

\* FEES INCLUDE: Fed RT(\$0.00) | Fed RT Check(\$0.00) | State RT(\$0.00) |

## GENERAL

ENTITY	ADJUSTED GROSS INCOME	TAXABLE INCOME	TAX LIABILITY	TOTAL PAYMENTS	REFUND / BALANCE DUE	SETTLEMENT OPTION
FEDERAL	69236	36934	3889	4179	306	IRS Refund   check
UTAH	69236	69236	3150	0	-482	DOR Bal Due   Paying With Check

## Form 1099R

PAYER	OWNER	TYPE	CODE	GROSS AMNT	TAXABLE AMNT	FED TAXES W/H	STATE DIST	STATE TAXES W/H	LCL TAXES W/H
CHARLES SCHWAB	T	I	4	41790	41790	4179	0	0	0

## INTEREST

SOURCE	EIN	GROSS	EXEMPT	BACKUP W/H
CHARLES SCHWAB CO INC	941737782	36		

## DIVIDENDS

PAYER	OWNER	ORDINARY INCOME	QUALIFIED DIVIDENDS	CAPITAL GAINS	NON-TAXABLE	EXEMPT INCOME	NOMINEE DISTRIBUTIONS	BACKUP W/H
CHARLES SCHWAB CO INC	Taxpayer	4671	665		2	32		

## SS / RRB TIER 1 / UNEMPLOYMENT

OWNER	TOTAL SSA RECVD	FED TAX W/H	RRB TIER 1BENEFITS RCVD	TOTAL UNEMPLOYMENT RECVD	FED TAX W/H	STATE TAX W/H
T	27980	0	0	0	0	0
S	19405	0	0	0	0	0



# H&R BLOCK®

## BLOCK ADVANTAGE

THOMAS H EWALL JR & AMELIA T

EWALL

04/10/2025

### YOUR TAX PROFESSIONAL TODAY:

Holly Steinhoff  
970-945-5631  
201 14TH ST STE 121  
GLENWOOD SPRINGS CO 81601

### WE'RE OPEN YEAR-ROUND:

Call 970-945-5631  
Visit [hrblock.com/myblock](http://hrblock.com/myblock).  
Download the MyBlock App.

### TAX PREP AND RELATED FEES:

Tax Preparation: \$324.00  
**Total: \$324.00**

### WHAT YOU CAN EXPECT:

Federal Refund: \$306.00  
Utah Balance Due: (\$482.00)  
Total Fees : (\$324.00)

\* Please note this amount may come in multiple deposits depending on when the taxing authorities issues your refunds. This is not proof of payment of your fees. Your fees will be paid from your refund account pursuant to the terms of the RT Application and Agreement. Please note if you choose a State RT and your state refund arrives before your federal refund, your fees will be paid from your Refund Account at that time. If applicable your total will be reduced by any other payments you authorize from your refund, such as repayment for Refund Advance or if you owe certain debt.

### WHAT YOU NEED TO KNOW:

**To check the status of your return, visit [hrblock.com/myreturnstatus](http://hrblock.com/myreturnstatus) or call 866-761-1040. You'll need your Social Security number and date of birth.**

**Refund:** Federal and State refund timing varies. Delivery of your Federal refund may be delayed if the IRS selects your return for further review. The Department of Treasury Offset Program may offset your tax refund to pay delinquent federal student loans, child support or other debt. Call the Treasury Offset Program Call Center at 800-304-3107 if you have questions.

**Balance Due:** If you have a Federal balance due and did not make arrangements today to pay the full amount, go to [DirectPay at IRS.gov](http://DirectPay.irs.gov) or mail in a check to pay the remaining balance by April 15. If you pay by credit/debit card, payment processor will assess a convenience fee. No part of this service fee goes to H&R Block. If you selected an installment plan, visit [IRS.gov](http://IRS.gov) to apply for an online payment agreement. If you have a State balance due and did not make arrangements today to pay the full amount, you can pay the remaining balance by credit/debit card or check. Follow state instructions to avoid additional penalties/fees.

**Extension:** If you filed an extension, the original return must be filed by October 15. Any balance due must be paid by April 15 to avoid penalties/interest.

Married Filing Jointly	Tax Bracket
\$0 - \$23,200	10%
\$23,201 - \$94,300	12%
\$94,301 - \$201,050	22%
\$201,051 - \$383,900	24%
\$383,901 - \$487,450	32%
\$487,451 - \$731,200	35%
\$731,201 or greater	37%

--\$23,200 of your income was taxed at 10%

--\$13,734 of your income was taxed at 12%

Your effective tax rate is 11%  
You paid \$3,873 in federal income taxes



# Your Personalized Tax Tips

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## Take all required minimum distributions

**Start claiming your retirement and avoid unwanted penalties by taking your monthly RMD payments.**

- **Why should I do this?** Claiming your RMD payments after you turn 73 will help you avoid tax penalties.
- **How Can I do this?** You can arrange automatic RMD payments with your financial institution. You can talk with your Tax Pro to learn more.

## MyBlock App

**The best way to safely store your most important info**

- **Why should I do this?** Block can help you keep your tax documents stored safely, follow the status your return, and chat with your Tax Pro securely. Best of all, it's 100% free.
- **How Can I do this?** You can start downloading the app by visiting the Apple App Store or Google Play and searching, "MyBlock."



# INVOICE

April 10, 2025

201 14TH ST  
GLENWOOD SPRINGS  
CO

**THOMAS EWALL**

Tax Prof Name: Holly Steinhoff

Office Number: 7088

Need to contact us? Call (970) 945-5631

## Your Current Returns Invoice

Description	Amount
<b>Federal</b>	<b>\$239.00</b>
Sold stock (1099-B)	\$40.00
Dividend (1099-DIV)	\$21.00
Student / Retired	\$178.00
<b>State</b>	<b>\$85.00</b>
State Return - UT TC-40 Individual Income Tax	\$85.00
<b>Fee Subtotal</b>	<b>\$324.00</b>
<b>Total Fees</b>	<b>\$324.00</b>

## Invoice Summary

Sub Total	<b>\$324.00</b>
Sales Tax	<b>\$0.00</b>
<b>Total Amount Due</b>	<b>\$324.00</b>



**2024 Federal Tax Return Filing**  
**Instructions**  
**FOR THE YEAR ENDING**  
December 31, 2024

<b>Prepared for</b>	THOMAS H EWALL JR AMELIA T EWALL																
<b>Tax Summary</b>	<table><tr><td>Gross Income.....</td><td>\$69236</td></tr><tr><td>Adjusted Gross Income.....</td><td>\$69236</td></tr><tr><td>Total Deductions.....</td><td>\$32302</td></tr><tr><td>Total Taxable Income.....</td><td>\$36934</td></tr><tr><td>Total Tax.....</td><td>\$3873</td></tr><tr><td>Total Payments.....</td><td>\$4179</td></tr><tr><td>Refund Amount.....</td><td>\$306</td></tr><tr><td>Amount You Owe.....</td><td>\$0</td></tr></table>	Gross Income.....	\$69236	Adjusted Gross Income.....	\$69236	Total Deductions.....	\$32302	Total Taxable Income.....	\$36934	Total Tax.....	\$3873	Total Payments.....	\$4179	Refund Amount.....	\$306	Amount You Owe.....	\$0
Gross Income.....	\$69236																
Adjusted Gross Income.....	\$69236																
Total Deductions.....	\$32302																
Total Taxable Income.....	\$36934																
Total Tax.....	\$3873																
Total Payments.....	\$4179																
Refund Amount.....	\$306																
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.

Your tax obligation is exactly met. No additional tax is due.



**2024 STATE TAX RETURN FILING  
INSTRUCTIONS  
UTAH  
FOR THE YEAR ENDING  
December 31, 2024**

<b>Prepared for</b>	THOMAS H EWALL and AMELIA T EWALL																					
<b>Tax Summary</b>	<table><tr><td>Adjusted Gross Income.....</td><td>\$</td><td>69,236</td></tr><tr><td>Total Deductions.....</td><td>\$</td><td>0</td></tr><tr><td>Total Taxable Income.....</td><td>\$</td><td>69,236</td></tr><tr><td>Total Tax.....</td><td>\$</td><td>3,150</td></tr><tr><td>Total Payments.....</td><td>\$</td><td>0</td></tr><tr><td>Refund Amount.....</td><td>\$</td><td>0</td></tr><tr><td>Amount You Owe.....</td><td>\$</td><td>482</td></tr></table>	Adjusted Gross Income.....	\$	69,236	Total Deductions.....	\$	0	Total Taxable Income.....	\$	69,236	Total Tax.....	\$	3,150	Total Payments.....	\$	0	Refund Amount.....	\$	0	Amount You Owe.....	\$	482
Adjusted Gross Income.....	\$	69,236																				
Total Deductions.....	\$	0																				
Total Taxable Income.....	\$	69,236																				
Total Tax.....	\$	3,150																				
Total Payments.....	\$	0																				
Refund Amount.....	\$	0																				
Amount You Owe.....	\$	482																				
<b>Make check payable to</b>	Utah State Tax Commission																					
<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.																					

**Special Instructions**

## 2024 TWO YEAR COMPARISON

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records

	2024	2023	Difference
Filing status	MFJ	MFJ	
<b>INCOME:</b>			
Wages, salaries, tips, etc.			
Interest income	36	19	17
Ordinary dividend income	4,671	6,391	-1,720
IRA distributions and pension income	41,790		41,790
Taxable social security income	25,739		25,739
Capital gain or (loss) (Schedule D)	-3,000	-3,000	
<b>Schedule 1 - Income</b>			
Refunds of state and local taxes			
Alimony received			
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>	<b>69,236</b>	<b>3,410</b>	<b>65,826</b>
<b>ADJUSTMENTS:</b>			
<b>Schedule 1 - Adjustments</b>			
Educator expenses			
Busn expenses for reservists, performing artists, etc			
Health savings account deduction			
Moving expenses			
Deductible part of self-employment tax			
Self-employed SEP, SIMPLE and qualified plans deduction			
Self-employed health insurance			
Penalty on early withdrawal of savings			
Alimony paid			
IRA contributions			
Student loan interest deduction			
Archer MSA deduction			
Other adjustments			
<b>Total adjustments</b>			
<b>ADJUSTED GROSS INCOME:</b>	<b>69,236</b>	<b>3,410</b>	<b>65,826</b>
<b>DEDUCTIONS:</b>			
Standard deduction or Itemized deductions	32,300	30,700	1,600
Charitable contributions if taking standard deduction	N/A		
If itemized, Schedule A deductions:			
Medical and dental expenses			
Sales, income, and other taxes paid	955		955
Interest paid			
Gifts to charity			
Casualty and theft losses			
Other miscellaneous deductions			
Qualified business income deduction	2		2
<b>TAXABLE INCOME:</b>	<b>36,934</b>		<b>36,934</b>

## 2024 TWO YEAR COMPARISON

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records

	2024	2023	Difference
<b>TAX COMPUTATION (BEFORE CREDITS):</b>			
Tax .....	3,889		3,889
Tax calculation method .....	QDCGTW	QDCGTW	
<b>Schedule 2 - Taxes</b>			
Additions to Tax .....			
Alternative minimum tax .....			
Total taxes .....	3,889		3,889
Tax rate .....	12%	10%	
<b>CREDITS:</b>			
Child and other dependents tax credit .....			
<b>Schedule 3 - Non-Refundable Credits</b>			
Foreign tax credit .....	16		16
Child care credit .....			
Education credit .....			
Retirement savings contribution credit .....			
Other credits .....			
Total credits .....	16		16
<b>OTHER TAXES:</b>			
<b>Schedule 2 - Other Taxes</b>			
Self-employment tax .....			
Additional tax on IRAs .....			
Other taxes .....			
<b>TOTAL TAXES:</b> .....	3,873		3,873
<b>PAYMENTS:</b>			
Federal income tax withheld .....	4,179		4,179
Estimated payments made .....			
Earned income credit .....			
Refundable child tax credit or additional child tax credit .....			
American opportunity credit .....			
<b>Schedule 3 - Refundable Credits &amp; Payments</b>			
ACA premium tax credit .....			
Qualified sick and family leave credit .....			
Other payments .....			
Total payments .....	4,179		4,179
<b>AMOUNT DUE / REFUND:</b>			
Amount overpaid .....	306		306
Overpayment applied to next year .....			
Refund .....	306		306
Amount due .....			
Penalty .....			

### 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



For the year Jan. 1–Dec. 31, 2024, or other tax year beginning \_\_\_\_\_, 2024, ending \_\_\_\_\_, 20 \_\_\_\_ See separate instructions.

Your first name and middle initial THOMAS H		Last name EWALL JR		Your social security number 556-88-7326	
If joint return, spouse's first name and middle initial AMELIA T		Last name EWALL		Spouse's social security number 637-20-4468	
Home address (number and street). If you have a P.O. box, see instructions. 1370 CENTER DR APT 9				Apt. no.	
City, town, or post office. If you have a foreign address, also complete spaces below. PARK CITY				State UT	ZIP code 84098
Foreign country name		Foreign province/state/county		Foreign postal code	
Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse					

Filing Status

Check only one box.

☐ Single  
☒ Married filing jointly (even if only one had income)  
☐ Head of household (HOH)  
☐ Qualifying surviving spouse (QSS)  
☐ Married filing separately (MFS)

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

☐ If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required): \_\_\_\_\_

Digital Assets

At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)

☐ 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, 1960 ☐ Are blind  
☐ Spouse: ☒ Was born before January 2, 1960 ☐ Is blind

Dependents (see instructions):	(1) First name	Last name	(2) Social security no.	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	
					Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

Attach Schedule B if required.

1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	
b	Household employee wages not reported on Form(s) W-2	1b	
c	Tip income not reported on line 1a (see instructions)	1c	
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
e	Taxable dependent care benefits from Form 2441, line 26	1e	
f	Employer-provided adoption benefits from Form 8839, line 29	1f	
g	Wages from Form 8919, line 6	1g	
h	Other earned income (see instructions)	1h	
i	Nontaxable combat pay election (see instructions)	1i	
z	Add lines 1a through 1h	1z	
2a	Tax-exempt interest	2a	32
3a	Qualified dividends	3a	665
4a	IRA distributions	4a	
5a	Pensions and annuities	5a	
6a	Social security benefits	6a	47,385
b	Taxable interest	2b	36
b	Ordinary dividends	3b	4,671
b	Taxable amount	4b	41,790
b	Taxable amount	5b	
b	Taxable amount	6b	25,739
c	If you elect to use the lump-sum election method, check here (see instructions)		<input type="checkbox"/>

	<b>7</b>	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	<b>7</b>	-3,000
	<b>8</b>	Additional income from Schedule 1, line 10	<b>8</b>	
	<b>9</b>	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b>	<b>9</b>	69,236
	<b>10</b>	Adjustments to income from Schedule 1, line 26	<b>10</b>	
<b>Standard Deduction</b> See Standard Deduction Chart on the last page of this form.	<b>11</b>	Subtract line 10 from line 9. This is your <b>adjusted gross income</b>	<b>11</b>	69,236
	<b>12</b>	<b>Standard deduction or itemized deductions</b> (from Schedule A)	<b>12</b>	32,300
	<b>13</b>	Qualified business income deduction from Form 8995 or Form 8995-A	<b>13</b>	2
	<b>14</b>	Add lines 12 and 13	<b>14</b>	32,302
	<b>15</b>	Subtract line 14 from line 11. If zero or less, enter -0-. This is your <b>taxable income</b>	<b>15</b>	36,934
<b>Tax and Credits</b>	<b>16</b>	<b>Tax</b> (see instructions). Check if any from: <b>1</b> <input type="checkbox"/> Form(s) 8814 <b>2</b> <input type="checkbox"/> Form 4972 <b>3</b> <input type="checkbox"/>	<b>16</b>	3,889
	<b>17</b>	Amount from Schedule 2, line 3	<b>17</b>	
	<b>18</b>	Add lines 16 and 17	<b>18</b>	3,889
	<b>19</b>	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>	16
	<b>21</b>	Add lines 19 and 20	<b>21</b>	16
	<b>22</b>	Subtract line 21 from line 18. If zero or less, enter -0-	<b>22</b>	3,873
	<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>	3,873
<b>Payments</b>	<b>25</b>	Federal income tax withheld from:		
	<b>a</b>	Form(s) W-2	<b>25a</b>	
	<b>b</b>	Form(s) 1099	<b>25b</b>	4,179
	<b>c</b>	Other forms (see instructions)	<b>25c</b>	
	<b>d</b>	Add lines 25a through 25c	<b>25d</b>	4,179
	<b>26</b>	2024 estimated tax payments and amount applied from 2023 return	<b>26</b>	
	<b>27</b>	Earned income credit (EIC)	<b>27</b>	
	<b>28</b>	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>	Reserved for future use	<b>30</b>	
<b>31</b>	Amount from Schedule 3, line 15	<b>31</b>		
	<b>32</b>	Add lines 27, 28, 29, and 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>	4,179

Go to [www.irs.gov/Form1040SR](https://www.irs.gov/Form1040SR) for instructions and the latest information.Form **1040-SR** (2024)

Direct deposit? See instructions.	<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>	306	
		<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>	306	
		<b>b</b>	Routing number XXXXXXXXXXXXXXXXXXXX	<b>c</b> Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
		<b>d</b>	Account number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			
	<b>36</b>	Amount of line 34 you want <b>applied to your 2025 estimated tax</b> ....	<b>36</b>			

<b>Amount You Owe</b>	<b>37</b>	Subtract line 33 from line 24. This is the <b>amount you owe</b> . For details on how to pay, go to <a href="http://www.irs.gov/Payments">www.irs.gov/Payments</a> or 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 checked="" type="checkbox"/> <b>Yes</b> . Complete below. <input type="checkbox"/> <b>No</b>		
	Designee's name	H AND R BLOCK	Phone no.	970-945-5631	Personal identification number (PIN)	02341

Joint return? See instructions. Keep a copy for your records.	<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.			
	Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)	
	Spouse's signature. If a joint return, <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. 9727571305	Email address	EWALLT@YAHOO.COM		

<b>Paid Preparer Use Only</b>	Preparer's name	Preparer's signature	Date	PTIN	Check if:
	Holly Steinhoff	Holly Steinhoff	04-10-2025	P00426450	<input type="checkbox"/> Self-employed
	Firm's name	H AND R BLOCK			Phone no. 970-945-5631
	Firm's address	201 14TH ST GLENWOOD SPRINGS CO 81601			Firm's EIN 994476152

Go to [www.irs.gov/Form1040SR](http://www.irs.gov/Form1040SR) for instructions and the latest information.Form **1040-SR** (2024)

**Standard Deduction Chart\***Add the number of boxes checked in the "Age/Blindness" section of Standard Deduction on page 1 ..... 2

<b>IF your filing status is...</b>	<b>AND the number of boxes checked is...</b>	<b>THEN your standard deduction is...</b>
Single	1	\$16,550
	2	18,500
Married filing jointly	1	\$30,750
	2	32,300
	3	33,850
	4	35,400
Qualifying surviving spouse	1	\$30,750
	2	32,300
Head of household	1	\$23,850
	2	25,800
Married filing separately**	1	\$16,150
	2	17,700
	3	19,250
	4	20,800

\*Don't use this chart if someone can claim you (or your spouse if filing jointly) as a dependent, your spouse itemizes on a separate return, or you were a dual-status alien. Instead, see instructions.

\*\*You can check the boxes for your spouse if your filing status is married filing separately and your spouse had no income, isn't filing a return, and can't be claimed as a dependent on another person's return.

Go to [www.irs.gov/Form1040SR](https://www.irs.gov/Form1040SR) for instructions and the latest information.Form **1040-SR** (2024)

**SCHEDULE 3**

(Form 1040)

**Additional Credits and Payments**

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.

OMB No. 1545-0074

**2024**Attachment  
Sequence No. **03**Department of the Treasury  
Internal Revenue Service

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

THOMAS H EWALL JR &amp; AMELIA T EWALL

Your social security number

556-88-7326

**Part I Nonrefundable Credits**

1	Foreign tax credit. Attach Form 1116 if required .....	1	16
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441 .....	2	
3	Education credits from Form 8863, line 19 .....	3	
4	Retirement savings contributions credit. Attach Form 8880 .....	4	
5a	Residential clean energy credit from Form 5695, line 15 .....	5a	
b	Energy efficient home improvement credit from Form 5695, line 32 .....	5b	
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800 .....	6a	
b	Credit for prior year minimum tax. Attach Form 8801 .....	6b	
c	Adoption credit. Attach Form 8839 .....	6c	
d	Credit for the elderly or disabled. Attach Schedule R .....	6d	
e	Reserved for future use .....	6e	
f	Clean vehicle credit. Attach Form 8936 .....	6f	
g	Mortgage interest credit. Attach Form 8396 .....	6g	
h	District of Columbia first-time homebuyer credit. Attach Form 8859 .....	6h	
i	Qualified electric vehicle credit. Attach Form 8834 .....	6i	
j	Alternative fuel vehicle refueling property credit. Attach Form 8911 .....	6j	
k	Credit to holders of tax credit bonds. Attach Form 8912 .....	6k	
l	Amount on Form 8978, line 14. See instructions .....	6l	
m	Credit for previously owned clean vehicles. Attach Form 8936 .....	6m	
z	Other nonrefundable credits. List type and amount: .....	6z	
7	Total other nonrefundable credits. Add lines 6a through 6z .....	7	
8	Add lines 1 through 4, 5a, 5b, and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20 .....	8	16

**Part II Other Payments and Refundable Credits**

9	Net premium tax credit. Attach Form 8962 .....	9	
10	Amount paid with request for extension to file (see instructions) .....	10	
11	Excess social security and tier 1 RRTA tax withheld .....	11	
12	Credit for federal tax on fuels. Attach Form 4136 .....	12	
13	Other payments or refundable credits:		
a	Form 2439 .....	13a	
b	Section 1341 credit for repayment of amounts included in income from earlier years .....	13b	
c	Net elective payment election amount from Form 3800, Part III, line 6, column (j) .....	13c	
d	Deferred amount of net 965 tax liability (see instructions) .....	13d	
z	Other refundable credits (see instructions): .....	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z .....	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31 .....	15	

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

Schedule 3 (Form 1040) 2024

SCHEDULE B  
(Form 1040)

Department of the Treasury  
Internal Revenue Service

Interest and Ordinary Dividends

Attach to Form 1040 or 1040-SR.

Go to [www.irs.gov/ScheduleB](https://www.irs.gov/ScheduleB) for instructions and the latest information.

OMB No. 1545-0074

2024

Attachment  
Sequence No. 08

Name(s) shown on return

THOMAS H EWALL JR & AMELIA T EWALL

Your social security no.

556-88-7326

Part I  
Interest

(See instructions  
and the  
Instructions for  
Form 1040, line  
2b.)

**Note:** If you  
received a  
Form 1099-INT,  
Form 1099-OID,  
or substitute  
statement from  
a brokerage firm,  
list the firm's  
name as the  
payer and enter  
the total interest  
shown on that  
form.

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

CHARLES SCHWAB CO INC  
INTEREST SUBTOTAL

Amount

36

36

1

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

2

3

4

36

36

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

Amount

Part II  
Ordinary  
Dividends

(See instructions  
and the  
Instructions  
for Form 1040,  
line 3b.)

**Note:** If you  
received a  
Form 1099-DIV  
or substitute  
statement from  
a brokerage  
firm, list the  
firm's name as  
the payer and  
enter the ordinary  
dividends shown  
on that form.

- 5 List name of payer: CHARLES SCHWAB CO INC

5

4,671

- 6 Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b. . . . .

6

4,671

**Note:** If line 6 is over \$1,500, you must complete Part III.

Part III  
Foreign  
Accounts  
and Trusts

**Caution:** If required, failure to file FinCEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instructions.

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

Yes

No

- 7a At any time during 2024, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions . . . . .
- If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements . . . . .

X

- b If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located: . . . . .

- 8 During 2024, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions . . . . .

X

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

Schedule B (Form 1040) 2024

**SCHEDULE D**  
**(Form 1040)**Department of the Treasury  
Internal Revenue Service**Capital Gains and Losses**

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

Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.  
Go to [www.irs.gov/ScheduleD](http://www.irs.gov/ScheduleD) for instructions and the latest information.

OMB No. 1545-0074

**2024**Attachment  
Sequence No. **12**

Name(s) shown on return

THOMAS H EWALL JR &amp; AMELIA T EWALL

Your social security number

556-88-7326

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 II, 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 . . . . .				
<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> ( 3,737 )
<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> -3,737

**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 . . . . .	21,745	22,106		-361
<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> ( 2,502 )
<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> -2,863

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

Schedule D (Form 1040) 2024

**Part III Summary**

<b>16</b>	Combine lines 7 and 15 and enter the result . . . . .	<b>16</b>	-6,600
	<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 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 Form 1040, 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>	<b>21</b>	( 3,000 )
	<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 checked="" type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Form 1040, line 16.  <input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.		



**Qualified Business Income Deduction  
Simplified Computation**Department of the Treasury  
Internal Revenue Service**Attach to your tax return.**  
**Go to [www.irs.gov/Form8995](https://www.irs.gov/Form8995) for instructions and the latest information.****2024**  
Attachment  
Sequence No. **55**

Name(s) shown on return

Your taxpayer identification number

THOMAS H EWALL JR &amp; AMELIA T EWALL

556-88-7326

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

Use this form if your taxable income, before your qualified business income deduction, is at or below \$191,950 (\$383,900 if married filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i			
ii			
iii			
iv			
v			
2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c) . . .	2	
3	Qualified business net (loss) carryforward from the prior year . . . . .	3	( )
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0- . . .	4	0
5	Qualified business income component. Multiply line 4 by 20% (0.20) . . . . .	5	
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions) . . . . .	6	10
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year . .	7	( )
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0- . . . . .	8	10
9	REIT and PTP component. Multiply line 8 by 20% (0.20) . . . . .	9	2
10	Qualified business income deduction before the income limitation. Add lines 5 and 9 . . . . .	10	2
11	Taxable income before qualified business income deduction (see instructions) . . . .	11	36,936
12	Enter your net capital gain, if any, increased by any qualified dividends (see instructions) . . . . .	12	665
13	Subtract line 12 from line 11. If zero or less, enter -0- . . . . .	13	36,271
14	Income limitation. Multiply line 13 by 20% (0.20) . . . . .	14	7,254
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also enter this amount on the applicable line of your return (see instructions) . . . . .	15	2
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0- . . . . .	16	( )
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0- . . . . .	17	( )

**For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8995** (2024)

Form **8879**

(Rev. January 2025)

Department of the Treasury  
Internal Revenue Service**IRS e-file Signature Authorization**

CLIENT COPY

OMB No. 1545-0074

► ERO must obtain and retain completed Form 8879.  
► Go to [www.irs.gov/Form8879](http://www.irs.gov/Form8879) for the latest information.

Submission Identification Number (SID) 

Taxpayer's name <b>THOMAS H EWALL JR</b>	Social security number <b>556-88-7326</b>
Spouse's name <b>AMELIA T EWALL</b>	Spouse's social security number <b>637-20-4468</b>

**Part I Tax Return Information -- Tax Year Ending December 31, 2024** (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

**Note:** Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1 Adjusted gross income	1	69,236
2 Total tax	2	3,873
3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3	4,179
4 Amount you want refunded to you	4	306
5 Amount you owe	5	

**Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)**

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

**Taxpayer's PIN: check one box only**

- ☒ I authorize H AND R BLOCK to enter or generate my PIN 17326 as my  
ERO firm name  
signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros
- ☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only**  
if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► SIGNATURE AND DATE ON FILEDate ► 04-10-2025**Spouse's PIN: check one box only**

- ☒ I authorize H AND R BLOCK to enter or generate my PIN 14468 as my  
ERO firm name  
signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros
- ☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only**  
if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► SIGNATURE AND DATE ON FILEDate ► 04-10-2025**Practitioner PIN Method Returns Only -- continue below****Part III Certification and Authentication -- Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.

84177902341**Don't enter all zeros**

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ► Holly SteinhoffDate ► 04-10-2025

**ERO Must Retain This Form -- See Instructions**  
**Don't Submit This Form to the IRS Unless Requested To Do So**

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

Form **8879** (Rev. 01-2025)

**IRS e-file Signature Authorization**

► **ERO must obtain and retain completed Form 8879.**  
 ► **Go to [www.irs.gov/Form8879](http://www.irs.gov/Form8879) for the latest information.**

OMB No. 1545-0074

Submission Identification Number (SID) 

Taxpayer's name <b>THOMAS H EWALL JR</b>	<b>Social security number</b> 556-88-7326
Spouse's name <b>AMELIA T EWALL</b>	<b>Spouse's social security number</b> 637-20-4468

**Part I Tax Return Information -- Tax Year Ending December 31, 2024** (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

**Note:** Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1 Adjusted gross income . . . . .	1	69,236
2 Total tax . . . . .	2	3,873
3 Federal income tax withheld from Form(s) W-2 and Form(s) 1099 . . . . .	3	4,179
4 Amount you want refunded to you . . . . .	4	306
5 Amount you owe . . . . .	5	

**Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)**

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

**Taxpayer's PIN: check one box only**

- ☒ I authorize H AND R BLOCK to enter or generate my PIN 17326 as my  
**ERO firm name**  
 signature on the income tax return (original or amended) I am now authorizing. **Enter five digits, but don't enter all zeros**
- ☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ► \_\_\_\_\_ Date ► \_\_\_\_\_

**Spouse's PIN: check one box only**

- ☒ I authorize H AND R BLOCK to enter or generate my PIN 14468 as my  
**ERO firm name**  
 signature on the income tax return (original or amended) I am now authorizing. **Enter five digits, but don't enter all zeros**
- ☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ► \_\_\_\_\_ Date ► \_\_\_\_\_

**Practitioner PIN Method Returns Only -- continue below****Part III Certification and Authentication -- Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.

84177902341**Don't enter all zeros**

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Pub. 1345**, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ► \_\_\_\_\_ Date ► 04-10-2025

**ERO Must Retain This Form -- See Instructions**  
**Don't Submit This Form to the IRS Unless Requested To Do So**

**For Paperwork Reduction Act Notice, see your tax return instructions.**Form **8879** (Rev. 01-2021)

## 2024 PENSIONS AND ANNUITIES SUMMARY ATTACHMENT

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Payer Name	Payer's Federal EIN	T or S	Pension Amount	Taxable Amount	Capital Gain Incl in Box 2a	Federal Tax Withheld	Distrib Code	IRA / SEP / SMPL	State	State Tax Withheld	Local Tax Withheld
------------	---------------------	--------	----------------	----------------	-----------------------------	----------------------	--------------	------------------	-------	--------------------	--------------------

CHARLES SCHWAB	94-1737782	T	41,790	41,790		4,179	4	X			
----------------	------------	---	--------	--------	--	-------	---	---	--	--	--

TOTAL 1099RS			41,790	41,790		4,179					
--------------	--	--	--------	--------	--	-------	--	--	--	--	--

## 2024 FEDERAL TAX WITHHOLDINGS ATTACHMENT

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

---

1099R

CHARLES SCHWAB

4,179

Total to Form 1040/1040-SR line 25d

4,179

# 2024 SOCIAL SECURITY TAXABLE BENEFITS WORKSHEET

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records  
Publication 915

- Before you begin:** ✓ If you are married filing separately and you lived apart from your spouse for all of 2024, enter "D" to the right of the word "benefits" on Form 1040 or 1040-SR, line 6a.
- ✓ Don't use this worksheet if you repaid benefits in 2024 and your total repayments (box 4 of Forms SSA-1099 and RRB-1099) were more than your gross benefits for 2024 (box 3 of Forms SSA-1099 and RRB-1099). None of your benefits are taxable for 2024. For more information, see "Repayments More Than Gross Benefits" in Pub 915.
- ✓ If you are filing Form 8815, Exclusion of Interest From Series EE and I U.S. Savings Bonds Issued After 1989, do not include the amount from line 2b of Form 1040 on line 3 of this worksheet. Instead, include the amount from Schedule B (Form 1040 or 1040-SR), line 2.

1. Enter the total amount from box 5 of ALL your Forms SSA-1099 and Forms RRB-1099. Also enter this amount on Form 1040 or 1040-SR, line 6a	1.	47,385	
2. Multiply line 1 by 50% (0.50)	2.		23,693
3. Combine the amounts from: Form 1040 or 1040-SR, lines 1z, 2b, 3b, 4b, 5b, 7, and 8.	3.		43,497
4. Enter the amount, if any, from Form 1040 or 1040-SR line 2a	4.		32
5. Enter the total of any exclusions/adjustments for: • Adoption benefits (Form 8839, line 28) • Foreign earned income or housing (Form 2555, lines 45 and 50), and • Certain income of bona fide residents of American Samoa (Form 4563, line 15) or Puerto Rico	5.		
6. Combine lines 2, 3, 4, and 5	6.		67,222
7. <b>Form 1040 filers:</b> Enter the amounts from Schedule 1, lines 11 through 20, and 23 and 25	7.		
8. Is the amount on line 7 less than the amount on line 6? <b>No.</b> <b>STOP</b> None of your social security benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b			
<b>Yes.</b> Subtract line 7 from line 6	8.		67,222
9. If you are: • Married filing jointly, enter \$32,000 • Single, head of household, qualifying surviving spouse, or married filing separately and you lived apart from your spouse for all of 2024, enter \$25,000	9.		32,000
<b>Note:</b> If you are married filing separately and you lived with your spouse at any time in 2024, skip lines 9 through 16; multiply line 8 by 85% (0.85) and enter the result on line 17. Then go to line 18. Is the amount on line 9 less than the amount on line 8?			
10. <b>No.</b> <b>STOP</b> None of your benefits are taxable. Enter -0- on Form 1040 or 1040-SR, line 6b. If you are married filing separately and you lived apart from your spouse for all of 2024, be sure you entered "D" to the right of the word "benefits" on Form 1040 or 1040-SR, line 6a.			
<b>Yes.</b> Subtract line 9 from line 8	10.		35,222
11. Enter: \$12,000 if married filing jointly; \$9,000 if single, head of household, qualifying surviving spouse, or married filing separately and you lived apart from your spouse for all of 2024	11.		12,000
12. Subtract line 11 from line 10. If zero or less, enter -0-	12.		23,222
13. Enter the <b>smaller</b> of line 10 or line 11	13.		12,000
14. Multiply line 13 by 50% (0.50)	14.		6,000
15. Enter the <b>smaller</b> of line 2 or line 14	15.		6,000
16. Multiply line 12 by 85% (0.85). If line 12 is zero, enter -0-	16.		19,739
17. Add lines 15 and 16	17.		25,739
18. Multiply line 1 by 85% (0.85)	18.		40,277
19. <b>Taxable benefits.</b> Enter the <b>smaller</b> of line 17 or line 18. Also enter this amount on Form 1040 or 1040-SR line 6b	19.		25,739

**TIP:** If you received a lump-sum payment in 2024 that was for an earlier year, also complete Worksheet 2 or 3 and Worksheet 4 to see if you can report a lower taxable benefit.

# 2024 QUALIFIED DIVIDENDS and CAPITAL GAIN TAX WORKSHEET – LINE 16

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

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**Before you begin:** ✓ See the instructions for line 16 in the instructions to see if you can use this worksheet to figure your tax.  
✓ Before completing this worksheet, complete Form 1040 or 1040-SR through line 15.  
✓ If you do not have to file Schedule D and you received capital gain distributions, be sure you checked the box on Form 1040 or 1040-SR, line 7.

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	36,934
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	665
3. Are you filing Schedule D?*		
X <b>Yes.</b> Enter the <b>smaller</b> of line 15 or 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0-	3.	0
<b>No.</b> Enter the amt from Fm 1040 or 1040-SR, ln 7.		
4. Add lines 2 and 3	4.	665
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	36,269
6. Enter: \$47,025 if single or married filing separately, \$94,050 if married filing jointly or Qualifying surviving spouse, \$63,000 if head of household.	6.	94,050
7. Enter the smaller of line 1 or line 6	7.	36,934
8. Enter the smaller of line 5 or line 7	8.	36,269
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	665
10. Enter the smaller of line 1 or line 4	10.	665
11. Enter the amount from line 9	11.	665
12. Subtract line 11 from line 10	12.	0
13. Enter: \$518,900 if single, \$291,850 if married filing separately, \$583,750 if married filing jointly or Qualifying surviving spouse, \$551,350 if head of household.	13.	583,750
14. Enter the smaller of line 1 or line 13	14.	36,934
15. Add lines 5 and 9	15.	36,934
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	0
17. Enter the smaller of line 12 or line 16	17.	0
18. Multiply line 17 by 15% (0.15)	18.	0
19. Add lines 9 and 17	19.	665
20. Subtract line 19 from line 10	20.	0
21. Multiply line 20 by 20% (0.20)	21.	0
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	3,889
23. Add lines 18, 21, and 22	23.	3,889
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	3,967
25. <b>Tax on all taxable income.</b> Enter the <b>smaller</b> of line 23 or line 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	3,889

\* If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.

# 2024 SCHEDULE D TAX WORKSHEETS

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records

## CAPITAL LOSS CARRYOVER WORKSHEET – LINES 6 and 14

Use this worksheet to figure your capital loss carryovers from 2023 to 2024 if your 2023 Schedule D, line 21, is a loss and **(a)** that loss is a smaller loss than the loss on your 2023 Schedule D, line 16, **or (b)** the amount on your 2023 Form 1040, line 15 (or your 2023 Form 1040NR, line 15, if applicable) is less than zero. Otherwise, you do not have any carryovers.

- |  |     |                |
|--|-----|----------------|
| 1. Enter the amount from your 2023 Form 1040, line 15, or your Form 1040NR, line 15. If a loss, enclose the amount in parentheses  | 1.  | <u>-27,290</u> |
| 2. Enter the loss from your 2023 Schedule D, line 21, as a positive amount.  | 2.  | <u>3,000</u>   |
| 3. Combine lines 1 and 2. If zero or less, enter -0-   | 3.  | <u>0</u>       |
| 4. Enter the <b>smaller</b> of line 2 or line 3  | 4.  | <u></u>        |
| <b>If line 7 of your 2023 Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.</b>   |     |                |
| 5. Enter the loss from your 2023 Schedule D, line 7, as a positive amount  | 5.  | <u>3,737</u>   |
| 6. Enter any gain from your 2023 Schedule D, line 15. If a loss, enter -0-   | 6.  | <u></u>        |
| 7. Add lines 4 and 6   | 7.  | <u></u>        |
| 8. <b>Short-term capital loss carryover for 2024.</b> Subtract line 7 from line 5. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 6   | 8.  | <u>3,737</u>   |
| <b>If line 15 of your 2023 Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.</b>   |     |                |
| 9. Enter the loss from your 2023 Schedule D, line 15, as a positive amount   | 9.  | <u>2,502</u>   |
| 10. Enter any gain from your 2023 Schedule D, line 7. If a loss, enter -0-   | 10. | <u></u>        |
| 11. Subtract line 5 from line 4. If zero or less, enter -0-  | 11. | <u>0</u>       |
| 12. Add lines 10 and 11  | 12. | <u></u>        |
| 13. <b>Long-term capital loss carryover for 2024.</b> Subtract line 12 from line 9. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 14 | 13. | <u>2,502</u>   |

## AMT CAPITAL LOSS CARRYOVER WORKSHEET – LINES 6 and 14

Use this worksheet to figure your capital loss carryovers from 2023 to 2024 if your 2022 Schedule D, line 21, is a loss and **(a)** that loss is a smaller loss than the loss on your 2023 Schedule D, line 16, **or (b)** the amount on your 2023 Form 1040, line 15 (or your 2023 Form 1040NR, line 15, if applicable) is less than zero. Otherwise, you do not have any carryovers.

- |  |     |                |
|--|-----|----------------|
| 1. Enter the amount from your 2023 Form 1040, line 15, or your Form 1040NR, line 15. If a loss, enclose the amount in parentheses  | 1.  | <u>-27,290</u> |
| 2. Enter the loss from your 2023 Schedule D, line 21, as a positive amount.  | 2.  | <u>3,000</u>   |
| 3. Combine lines 1 and 2. If zero or less, enter -0-   | 3.  | <u>0</u>       |
| 4. Enter the <b>smaller</b> of line 2 or line 3  | 4.  | <u></u>        |
| <b>If line 7 of your 2023 Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.</b>   |     |                |
| 5. Enter the loss from your 2023 Schedule D, line 7, as a positive amount  | 5.  | <u>3,737</u>   |
| 6. Enter any gain from your 2023 Schedule D, line 15. If a loss, enter -0-   | 6.  | <u>0</u>       |
| 7. Add lines 4 and 6   | 7.  | <u></u>        |
| 8. <b>Short-term capital loss carryover for 2024.</b> Subtract line 7 from line 5. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 6   | 8.  | <u>3,737</u>   |
| <b>If line 15 of your 2023 Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.</b>   |     |                |
| 9. Enter the loss from your 2023 Schedule D, line 15, as a positive amount   | 9.  | <u>2,502</u>   |
| 10. Enter any gain from your 2023 Schedule D, line 7. If a loss, enter -0-   | 10. | <u>0</u>       |
| 11. Subtract line 5 from line 4. If zero or less, enter -0-  | 11. | <u>0</u>       |
| 12. Add lines 10 and 11  | 12. | <u>0</u>       |
| 13. <b>Long-term capital loss carryover for 2024.</b> Subtract line 12 from line 9. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 14 | 13. | <u>2,502</u>   |



## 2024 SCHEDULE D TAX WORKSHEETS

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records

### CAPITAL LOSS CARRYFORWARD WORKSHEET\*

Use this worksheet to figure your capital loss carryovers from 2024 to 2025 if your 2024 Schedule D, line 21, is a loss and **(a)** that loss is a smaller loss than the loss on your 2024 Schedule D, line 16, **or (b)** the amount on your 2024 Form 1040 or 1040-SR, line 15 (or your 2024 Form 1040NR, line 15, if applicable) is less than zero. Otherwise, you do not have any carryovers.

- |  |     |               |
|--|-----|---------------|
| 1. Enter the amt from your 2024 Form 1040 or 1040-SR, line 15. If a loss, enclose the amt in parentheses . . . .         | 1.  | <u>36,934</u> |
| 2. Enter the loss from your 2024 Schedule D, line 21, as a positive amount . . . . .                                     | 2.  | <u>3,000</u>  |
| 3. Combine lines 1 and 2. If zero or less, enter -0- . . . . .   | 3.  | <u>39,934</u> |
| 4. Enter the smaller of line 2 or line 3 . . . . .   | 4.  | <u>3,000</u>  |
| <b>If line 7 of your 2023 Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.</b>       |     |               |
| 5. Enter the loss from your 2024 Schedule D, line 7, as a positive amount . . . . .                                      | 5.  | <u>3,737</u>  |
| 6. Enter any gain from your 2024 Schedule D, line 15. If a loss, enter -0- . . . . .                                     | 6.  | <u>0</u>      |
| 7. Add lines 4 and 6. . . . .  | 7.  | <u>3,000</u>  |
| 8. <b>Short-term capital loss carryover for 2025.</b> Subtract line 7 from line 5. If zero or less, enter -0- . . . . .  | 8.  | <u>737</u>    |
| <b>If line 15 of your 2023 Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.</b>                   |     |               |
| 9. Enter the loss from your 2024 Schedule D, line 15, as a positive amount . . . . .                                     | 9.  | <u>2,863</u>  |
| 10. Enter any gain from your 2024 Schedule D, line 7. If a loss, enter -0- . . . . .                                     | 10. | <u>0</u>      |
| 11. Subtract line 5 from line 4. If zero or less, enter -0- . . . . .  | 11. | <u>0</u>      |
| 12. Add lines 10 and 11 . . . . .  | 12. | <u>0</u>      |
| 13. <b>Long-term capital loss carryover for 2025.</b> Subtract line 12 from line 9. If zero or less, enter -0- . . . . . | 13. | <u>2,863</u>  |

**SCHEDULE D AMT**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

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

FOR AMT PURPOSES ONLY

**2024**

Attachment  
Sequence No. **12**

Name(s) shown on return

THOMAS H EWALL JR & AMELIA T EWALL

Your social security number

556-88-7326

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 . . . . .				
<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> ( 3,737 )
<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> -3,737

**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 . . . . .	21,745	22,106		-361
<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> ( 2,502 )
<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> -2,863

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

Schedule D (Form 1040) 2024

**Part III Summary**

<b>16</b>	Combine lines 7 and 15 and enter the result . . . . .	<b>16</b>	-6,600
	<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 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 you are 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 Form 1040, 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>	<b>21</b>	( 3,000 )
	<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 checked="" type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Form 1040, line 16.  <input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

# 2024 INVESTMENT INCOME WORKSHEET FOR EIC

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records  
Publication 596

Use this worksheet to figure investment income for the EIC when you file Form 1040 or 1040-SR.

## Interest and Dividends

- |  |    |              |
|--|----|--------------|
| 1. Enter any amount from Form 1040 or 1040-SR, line 2b .....   | 1. | <u>36</u>    |
| 2. Enter any amount from Form 1040 or 1040-SR, line 2a, plus any amount on Form 8814, line 1b .....  | 2. | <u>32</u>    |
| 3. Enter any amount from Form 1040 or 1040-SR, line 3b .....   | 3. | <u>4,671</u> |
| 4. Enter the amount from Schedule 1 (Form 1040), line 8z, 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 in this chapter to figure the amount to enter on this line.) . . . | 4. | _____        |

## Capital Gain Net Income

- |  |    |          |
|--|----|----------|
| 5. Enter the amount from Form 1040 or 1040-SR, line 7. If the amount on that line is a loss, enter -0- .....   | 5. | <u>0</u> |
| 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. | <u>0</u> |
| 7. Subtract line 6 of this worksheet from line 5 of this worksheet. (If the result is less than zero, enter -0-.) .....  | 7. | <u>0</u> |

## 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 8l .....                           | 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 24b ..... | 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. | <u>0</u> |

## Passive Activities

- |   |     |              |
|---|-----|--------------|
| 11. Enter the total of any net income from passive activities (such as income included on Schedule E, line 26, 29a (col. (h)), 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, line 26, 29b (col. (g)), 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. | <u>0</u>     |
| 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. <b>This is your investment income</b> .....  | 14. | <u>4,739</u> |
| 15. Is the amount on line 14 more than \$11,600?  |     |              |
| <input type="checkbox"/> <b>Yes.</b> You can't take the credit.   |     |              |
| <input checked="" type="checkbox"/> <b>No.</b> Go to Step 3 of the Form 1040 instructions for line 27 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, don't 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 or line 40 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, isn't from a passive activity, enter "NPA" and the amount of that income (or loss) on the dotted line next to line 26.

# 2024 QUALIFIED BUSINESS INCOME DEDUCTION WORKSHEET

## DETAIL BY BUSINESS

THOMAS H EWALL JR & AMELIA T EWALL

556-88-7326

Schedule/Form	DIV # 1
Business Name	CHARLES
EIN/SSN	94-1737782
Business Type	Non-Spec
Included in Aggregation #	
PTP Income	No
<b>Qualified Business Income (QBI)</b>	
1. Specified Business Income/Loss from Sch/Form	
2. Non-Specified Business Income/Loss from Sch/Form	
Less applicable adjustments from 1040 Schedule 1	
(includes SE Tax, SEHIN, & Qual Retirement plans)	
3. QBID Qualified Losses and ST Gains from Asset Disposition	
4. Net Qualified Business Income (QBI) (sum L1 - L3)	
<b>Qualified Other Income (QOI)</b>	
5. Qualified REIT Sec 199A Dividends from 1099-DIV and K-1s	10
6. Qualified Other Income from PTPs	
7. QOI Qualified Losses and ST Gains from Disposition incl Sale of PTP	
8. Net Qualified Other Income (QOI) (L5 + L6 + L7)	10
9. Net QBI and QOI (L4 + L8)	10

## 2025 CARRYFORWARD INFORMATION

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

Keep for Your Records

Itemized Returns Only – 2024 state and local tax refund (this amount will be proforma'd to

Taxable Refund Worksheet directly and may not be taxable in 2025)

Charitable contributions carryover to 2025 .....	
Estimated short-term capital loss carryover .....	737
Estimated long-term capital loss carryover .....	2,863
2024 tax liability (for 2025 Form 2210 purposes) .....	3,873
Form 8839: 2024 carryover of unqualified expenses .....	
Refund amount applied to 2025 .....	
Disallowed investment interest in 2024 .....	
Additional state taxes paid .....	
Form 8396: Mortgage interest credit from 2022 .....	
Mortgage interest credit from 2023 .....	
Mortgage interest credit from 2024 .....	
Form 8801: Minimum tax credit carryforward .....	0
Potential 2025 IRA contribution from 2024 tax refund .....	
NOL carryforward:	

### Regular Tax

from 2004	from 2014
from 2005	from 2015
from 2006	from 2016
from 2007	from 2017
from 2008	from 2018
from 2009	from 2019
from 2010	from 2020
from 2011	from 2021
from 2012	from 2022
from 2013	from 2023
Gross NOL generated in 2024 .....	
To be absorbed in carryback period .....	
Net carryforward from 2024 .....	
Total carryforward to 2025 .....	

### AMT Tax

from 2004	from 2014
from 2005	from 2015
from 2006	from 2016
from 2007	from 2017
from 2008	from 2018
from 2009	from 2019
from 2010	from 2020
from 2011	from 2021
from 2012	from 2022
from 2013	from 2023
Gross AMT NOL generated in 2024 .....	
To be absorbed in carryback period .....	
Net carryforward from 2024 .....	
Total carryforward to 2025 .....	

- 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 2025 .....
- General Business Credit carryforward to 2025 .....
- First-Time Homebuyer Credit Repayment carryforward to 2025 .....
- 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 2025.

2024 SCHEDULE B - INTEREST/DIVIDEND SUMMARY ATTACHMENT

THOMAS H EWALL JR

556-88-7326

TAX-EXEMPT INTEREST/DIVIDENDS

EXEMPT-INTEREST DIVIDENDS (FORM1099-DIV)	32
--	----

TOTAL TAX-EXEMPT INTEREST	32
---------------------------	----

TOTAL TAX-EXEMPT INTEREST TO 1040 LINE 2A	32
---	----

## 2024 UTAH TWO YEAR COMPARISON

Taxpayer's Last and First Name

THOMAS H EWALL JR & AMELIA T EWALL

Taxpayer's SSN

556-88-7326

	Tax Year 2024	Tax Year 2023	Difference
Filing status .....	MFJ		
Residency status .....	Resident		
Number of exemptions claimed .....			
State Base Form Filed .....	UTTC40		

### INCOME, DEDUCTIONS AND ADJUSTMENTS:

Federal Adjusted Gross Income .....	69,236		69,236
Additions to Federal Income .....			
Utah Income .....	69,236		69,236
Subtractions from federal Income .....			
Taxable Income .....	69,236		69,236

### TAX, CREDIT AND PAYMENTS:

Utah Tax .....	482		482
Net Tax .....	482		482
Income Tax Withheld .....			
Estimated Tax Payments .....			
Total Payments .....			

### REFUND OR BALANCE DUE

Other Penalties and Interests .....			
Amount You Owe .....	482		482
Overpayment Applied to Estimated Payments .....			
Amount to be Refunded .....			



Utah State Tax Commission  
210 North 1950 West  
Salt Lake City, UT 84134-0266

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Fold here for #10 envelope

Utah State Tax Commission  
210 North 1950 West  
Salt Lake City, UT 84134-0266

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Fold here for 6x9 envelope

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Fold here for #10 envelope

40401

1735

Utah State Tax Commission  
Utah Individual Income Tax ReturnAll state income tax dollars support education,  
children and individuals with disabilities.

• Amended Return – enter code: (see instructions)

2024  
TC-40

Full-yr Resident?

Your Social Security No.

556887326

Your first name

THOMAS H

Your last name

EWALL

Y/N

Y

Spouse's Soc. Sec. No.

637204468

Spouse's first name

AMELIA T

Spouse's last name

EWALL

Y

Address

1370 CENTER DR APT 9

Telephone number

9727571305

If deceased, complete

page 3, Part 1

City

PARK CITY

State

UT

ZIP+4

84098

Foreign country (if not U.S.)

## 1 Filing Status – enter code

1 = Single

• 2 = Married filing jointly

3 = Married filing separately

4 = Head of household

5 = Qualifying surviving spouse

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

## 2 Qualifying Dependents

a 0 Dependents age 16 and under

b Other dependents

c Dependents born in 2024

d Total (add lines a, b and c)

See instructions.

## 3 Election Campaign Fund

Does not increase your tax or reduce your refund.

Enter the code for the party of your choice. Yourself Spouse  
• N • NSee instructions for  
code letters or go to [incometax.utah.gov/elect](https://incometax.utah.gov/elect).

If no contribution, enter N.

4	Federal adjusted gross income from federal return	• 4	69236
5	Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)	• 5	
6	Total income – add line 4 and line 5	6	69236
7	State tax refund included on federal form 1040, Schedule 1, line 1 (if any)	• 7	
8	Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)	• 8	
9	Utah taxable income/loss – subtract the sum of lines 7 and 8 from line 6	• 9	69236
10	Utah tax – multiply line 9 by 4.55% (.0455) (not less than zero)	• 10	3150
11	Utah personal exemption (multiply line 2d by \$2,046)	• 11	
12	Federal standard or itemized deductions	• 12	32300
13	Add line 11 and line 12	13	32300
14	State income tax from federal form 1040, Schedule A, line 5a	• 14	
15	Subtract line 14 from line 13	15	32300
16	Initial credit before phase-out – multiply line 15 by 6% (.06)	• 16	1938
17	Enter: \$17,652 (single or married filing separately); \$26,478 (head of household); or \$35,304 (married filing jointly or qualifying surviving spouse)	• 17	35304
18	Income subject to phase-out – subtract line 17 from line 9 (not less than zero)	18	33932
19	Phase-out amount – multiply line 18 by 1.3% (.013)	• 19	441
20	Taxpayer tax credit – subtract line 19 from line 16 (not less than zero)	• 20	1497
21	If you are a qualified exempt taxpayer, enter "X" (complete worksheet in instr.)	• 21	
22	Utah income tax – subtract line 20 from line 10 (not less than zero)	• 22	1653

Electronic filing  
is quick, easy and  
free, and will  
speed up your refund.To learn more,  
go to  
[tap.utah.gov](https://tap.utah.gov)

23 Enter tax from TC-40, page 1, line 22	23	1653
24 Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)	• 24	1171
25 Full-year resident, subtract line 24 from line 23 (not less than zero) Non or Part-year resident, complete and enter the UTAH TAX from TC-40B, line 41	• 25	482
26 Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1)	• 26	
27 Subtract line 26 from line 25 (not less than zero)	27	482
28 Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3)	• 28	
29 AMENDED RETURN ONLY - previous refund	• 29	
30 Recapture of low-income housing credit	• 30	
31 Utah use tax	• 31	
32 <b>Total tax, use tax and additions to tax</b> (add lines 27 through 31)	32	482
33 Total withholding - If you have mineral production withholding or pass-through entity withholding, complete page 3, Part 5. If not, enter on line 33 the total of TC-40W, Part 1.	• 33	
34 Credit for Utah income taxes prepaid from TC-546 and 2023 refund applied to 2024	• 34	
35 AMENDED RETURN ONLY - previous payments	• 35	
36 Nonapportionable refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)	• 36	
37 Apportionable refundable credits from TC-40A, Part 6, line c (attach TC-40A, page 2)	• 37	
38 Total withholding and refundable credits - add lines 33 through 37	38	
39 <b>TAX DUE</b> - subtract line 38 from line 32 (not less than zero)	• 39	482
40 Penalty and interest (see instructions)	40	
41 <b>TOTAL DUE - PAY THIS AMOUNT</b> - add line 39 and line 40	• 41	482
42 <b>REFUND</b> - subtract line 32 from line 38 (not less than zero)	• 42	
43 Voluntary subtractions from refund (not greater than line 42) Enter the total from page 3, Part 6	• 43	
44 <b>REMAINING REFUND DIRECT DEPOSIT</b> - your account information (see instructions for foreign accounts)	checking	savings
• Routing number	• Account number	Type: • • •

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

SIGN	Your signature	Date	Spouse's signature (if filing jointly)	Date
HERE				

Third Party Designee	Name of designee (if any) you authorize to discuss this return H AND R BLOCK	Designee's telephone number 970-945-5631	Designee PIN • 02341
Paid Preparer's Section	Preparer's signature Holly Steinhoff	Date 04-10-2025	Preparer's PTIN • P00426450
	Firm's name and address H AND R BLOCK 201 14TH ST GLENWOOD SPRINGS CO 81601		Preparer's EIN • 994476152

Attach page 3 if you: are filing for a deceased taxpayer, are filing a fiscal year return, filed IRS form 8886, are making contributions, want to deposit into a my529 account, want to apply all/part of your refund to next year's taxes, have mineral production or pass-through entity with holding, or no longer qualify for a homeowner's exemption.

Part 1 – Additions to Income (enter the code and amount of each addition to income)	Code	Amount
See instructions or <a href="https://www.incometax.utah.gov">incometax.utah.gov</a> for codes.	.	
	.	
	.	
	.	
	.	
<b>Total additions to income</b> (add all additions to income and enter total here and on TC-40, line 5)		

Part 2 – Subtractions from Income (enter the code and amount of each subtraction from income)	Code	Amount									
See instructions or <a href="https://www.incometax.utah.gov">incometax.utah.gov</a> for codes.	.										
If using subtraction 77 (Native American Income), enter your enrollment number and tribal code:	.										
<table><thead><tr><th></th><th>Enrollment Number</th><th>Tribe Code</th></tr></thead><tbody><tr><td>You</td><td>.</td><td></td></tr><tr><td>Spouse</td><td>.</td><td></td></tr></tbody></table>		Enrollment Number	Tribe Code	You	.		Spouse	.		.	
	Enrollment Number	Tribe Code									
You	.										
Spouse	.										
	.										
<b>Total subtractions from income</b> (add all subtractions from income and enter total here and on TC-40, line 8)											

Part 3 – Apportionable Nonrefundable Credits (enter the code and amount of each credit)	Code	Amount
See instructions or <a href="https://www.incometax.utah.gov">incometax.utah.gov</a> for codes.	. AH	1171
	.	
If you are using credit 18 (Retirement Credit), enter your birth date(s):	.	
You . mm/dd/yy Spouse . mm/dd/yy	.	
	.	
	.	
<b>Total apportionable nonrefundable credits</b> (add all Part 3 credits and enter total here and on TC-40, line 24)		1171

Part 4 – Nonapportionable Nonrefundable Credits (enter the code and amount of each credit)	Code	Amount
See instructions or <a href="https://www.incometax.utah.gov">incometax.utah.gov</a> for codes.	.	
	.	
If you are using credit 02 (Qualified Sheltered Workshop), enter the sheltered workshop's name:	.	
	.	
	.	
<b>Total nonapportionable nonrefundable credits</b> (add all Part 4 credits and enter total here and on TC-40, line 26)		

## 2024 UTAH – TC-40A, PART 3 Retirement Tax Credit Worksheets

THOMAS H EWALL JR & AMELIA T EWALL  
556-88-7326

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### Retirement Credit Worksheet Code 18:

1	If only you or only your spouse is taking this credit, enter 450. If both you and your spouse are taking this credit, enter 900.	1	450
2	Enter the amount from TC-40, line 6 (Total income)	2	69236
3	Enter municipal bond interest from TC-40, Schedule A, Part 1, code 57.	3	0
4	Line 2 minus line 3.	4	69236
5	Enter tax exempt interest from federal form 1040 or 1040-SR, line 2a	5	32
6	Modified Adjusted Gross Income Add lines 4 and 5	6	69268
7	Enter:	7	32000
	a. Married filing separately: \$16,000		
	b. Married filing federal return 1040NR: \$16,000		
	c. Married filing joint: \$32,000		
	d. Single: \$25,000		
	e. Qualified surviving spouse or head of household: \$32,000		
8	Line 6 minus line 7 (not less than zero)	8	37268
9	Multiply line 8 by 0.025	9	932
10	Retirement credit – subtract line 9 from line 1 (not less than zero). If you (and/or your spouse) claim this credit, enter the total amount on TC-40A, Part 3, using code 18. Also enter your (and/or your spouse's) birthdate(s).	10	0

### Social Security Credit Worksheet Code AH:

1	For yourself (and/or your spouse), enter the amount from federal return 1040 or 1040-SR, line 6b; or 1040NR, Schedule NEC, line 8.	1	25,739
2	Enter the amount from TC-40, line 6 (Total income)	2	69,236
3	Enter municipal bond interest from TC-40, Schedule A, Part 1, code 57.	3	0
4	Line 2 minus line 3.	4	69,236
5	Enter tax exempt interest from federal form 1040 or 1040-SR, line 2a	5	32
6	Modified adjusted gross income Add lines 4 and 5	6	69,268
7	Multiply line 1 by 0.0455	7	1,171
8	Enter:	8	75,000
	a. Married filing separately: \$37,500		
	b. Married filing federal return 1040NR: \$37,500		
	c. Married filing joint: \$75,000		
	d. Single: \$45,000		
	e. Qualifying surviving spouse or head of household: \$75,000		
9	Line 6 minus line 8 (not less than zero)	9	0
10	Multiply line 9 by 0.025	10	0
11	Social Security Benefits credit-Line 7 minus line 10 (not less than zero) If claiming this credit, enter the total amount on TC-40A, Part 3, using code AH.	11	1,171

### Military Retirement Credit Worksheet Code AJ:

#### Taxpayer:

1	Enter the amount of taxable military retirement pay reported on DFAS 1099-R	1	0
2	Multiply line 1 by 4.55% (.0455)	2	0

#### Spouse:

1	Enter the amount of taxable military retirement pay reported on DFAS 1099-R	1	0
2	Multiply line 1 by 4.55% (.0455)	2	0

Total of Military Retirement Credit worksheets for Taxpayer and Spouse.  
Enter this amount on TC-40A, Part 3, using code AJ

Total Retirement Credit 0

**Individual Income Tax Return Coupon****Use of Payment Coupon**

If you have a tax due balance on your Utah individual income tax return and you have previously filed your return (either electronically or by paper) without a payment, include the payment coupon below with your check or money order to insure proper credit to your account. Do not mail another copy of your income tax return with this payment. Sending a duplicate of your return may delay posting of the payment.

If you are sending a payment with your paper Utah individual income tax return, include the payment coupon below with your check or money order, to insure proper credit to your account.

Do not use this return payment coupon to prepay future individual income taxes. Use form TC-546.

**Electronic Payment**

You may pay your tax online at [tap.utah.gov](http://tap.utah.gov).

**How to Prepare the Payment**

Make your check or money order payable to the Utah State Tax Commission. Do not send cash. The Tax Commission does not assume liability for loss of cash placed in the mail.

Print your name and address, daytime telephone number and the year the payment is for on your check or money order.

**Sending Payment Coupon**

If sending this payment coupon separate from your individual income tax return, do **NOT** mail another copy of your return with this payment.

Complete and detach the payment coupon below.

Do not attach (staple, paper clip, etc.) the check or money order to the payment coupon.

Send the payment coupon and payment to:

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

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

24 UT5471 BWO 1040 Form Software Copyright 1996 - 2025 HRB Tax Group, Inc

**Individual Income Tax  
Return Payment Coupon**

Tax year ending  
2024

USTC Use Only

**Mail to: Utah State Tax Commission, 210 N 1950 W, SLC UT 84134-0266** Rev. 12/11

Primary taxpayer name THOMAS H EWALL JR	Social Security no. 556-88-7326
--	------------------------------------

Secondary taxpayer name AMELIA T EWALL	Social Security no. 637-20-4468
---	------------------------------------

Address 1370 CENTER DR APT 9		
City PARK CITY	State UT	ZIP code 84098

Payment amount enclosed	\$	482	00
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Make check or money order payable to the Utah State Tax Commission.  
Do not send cash. Do not staple check to coupon. Detach check stub.

**TC-547**

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