Electronic Filing Instructions for your 2022 Federal Tax Return

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

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA
1928 Everglades Dr
Milpitas, CA 95035-6612

Balance Due/ Refund	Your federal tax return (Form 1040) shows a refund due to you in the amount of $2,345.00. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 009514643274 Routing Transit Number: 011000138.
When Will You Get Your Refund?	The IRS issued more than 9 out of 10 refunds to taxpayers in less than 21 days last year. The same results are expected in 2023. To get your estimated refund date from TurboTax, log into My TurboTax at www.turbotax.com. If you do not receive your refund within 21 days, or the amount you get is not what you expected, contact the Internal Revenue Service directly at 1-800-829-4477. You can also check www.irs.gov and select the "Where's my refund?" link.
What You Need to Keep	Your Electronic Filing Instructions (this form) A copy of your federal return

2022 Federal Tax Return Summary

Adjusted Gross Income	$	273,941.00
Taxable Income	$	248,009.00
Total Tax	$	38,771.00
Total Payments/Credits	$	41,116.00
Amount to be Refunded	$	2,345.00
Effective Tax Rate		14.02%

Estimated Payments to Make for Next Year's Return

Estimated Payments for 2023 - Do not mail these vouchers with your 2022 income tax return. The estimated vouchers displayed below are used to prepay your 2023 income taxes that will be filed next year. If you expect to owe more than $1,000 in 2023, you may incur underpayment penalties if you do not make these four estimated tax payments. This printout includes your estimated tax vouchers for your federal estimated taxes (Form 1040-ES).

Mail payments according to the schedule below:

Voucher Number	Due Date		Amount
1	04/18/2023	$	383.00
2	06/15/2023	$	383.00
3	09/15/2023	$	383.00
4	01/16/2024	$	383.00

Include a separate check or money order for each payment, payable to "United States Treasury". Write your social security number and "Form 1040-ES" on each check.

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA
1928 Everglades Dr
Milpitas, CA 95035-6612

Estimated Payments to Make for Next Year's Return (Continued)	Mail payments to: Internal Revenue Service P.O. Box 802502 Cincinnati, OH 45280-2502

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due 04/18/2023

2023 Form 1040-ES Payment Voucher 1

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2023 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax you are paying by check or money order. . . . . ▸	383.

REV 03/22/23 TTW 1555

024-88-7197 382-35-7565
LEELA SESHU REDDY CHEEDEPUDI
VANI YENUMULA
1928 EVERGLADES DR
MILPITAS CA 95035-6612

INTERNAL REVENUE SERVICE
PO BOX 802502
CINCINNATI OH 45280-2502

024887197 CP CHEE 30 0 202312 430

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due 06/15/2023

2023 Form 1040-ES Payment Voucher 2

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2023 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax you are paying by check or money order. . . . . ►	383.

REV 03/22/23 TTW 1555

024-88-7197 382-35-7565
LEELA SESHU REDDY CHEEDEPUDI
VANI YENUMULA
1928 EVERGLADES DR
MILPITAS CA 95035-6612

INTERNAL REVENUE SERVICE
PO BOX 802502
CINCINNATI OH 45280-2502

024887197 CP CHEE 30 0 202312 430

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due 09/15/2023

2023 Form 1040-ES Payment Voucher 3

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2023 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax you are paying by check or money order. . . . . ►	383.

REV 03/22/23 TTW 1555

024-88-7197 382-35-7565
LEELA SESHU REDDY CHEEDEPUDI
VANI YENUMULA
1928 EVERGLADES DR
MILPITAS CA 95035-6612

INTERNAL REVENUE SERVICE
PO BOX 802502
CINCINNATI OH 45280-2502

024887197 CP CHEE 30 0 202312 430

▼ Detach Here and Mail With Your Payment ▼

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due 01/16/2024

2023 Form 1040-ES Payment Voucher 4

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2023 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax you are paying by check or money order. . . . . ►	383.

REV 03/22/23 TTW 1555

024-88-7197 382-35-7565
LEELA SESHU REDDY CHEEDEPUDI
VANI YENUMULA
1928 EVERGLADES DR
MILPITAS CA 95035-6612

INTERNAL REVENUE SERVICE
PO BOX 802502
CINCINNATI OH 45280-2502

024887197 CP CHEE 30 0 202312 430

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return 2022
OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box.
☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

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:

Your first name and middle initial	Last name	Your social security number
LEELA SESHU REDDY	CHEEDEPUDI	024-88-7197
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
VANI	YENUMULA	382-35-7565

Home address (number and street). If you have a P.O. box, see instructions.: 1928 Everglades Dr
Apt. no.:

City, town, or post office. If you have a foreign address, also complete spaces below.: Milpitas
State: CA
ZIP code: 950356612

Foreign country name: | Foreign province/state/county: | Foreign postal code:

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

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, 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, 1958 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions):
If more than four dependents, see instructions and check here ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Child tax credit	(4) Credit for other dependents
PRATEEK R	CHEEDEPUDI	380-35-5303	Son	☒	☐
TARA R	CHEEDEPUDI	768-47-7952	Daughter	☒	☐
				☐	☐
				☐	☐

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 Sch. B if required.

1a	Total amount from Form(s) W-2, box 1 (see instructions)				1a	268,854.
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	0.
i	Nontaxable combat pay election (see instructions)	1i				
z	Add lines 1a through 1h				1z	268,854.
2a	Tax-exempt interest	2a	93.	b Taxable interest	2b	268.
3a	Qualified dividends	3a	3,309.	b Ordinary dividends	3b	4,019.
4a	IRA distributions	4a		b Taxable amount	4b	
5a	Pensions and annuities	5a		b Taxable amount	5b	
6a	Social security benefits	6a		b Taxable amount	6b	
c	If you elect to use the lump-sum election method, check here (see instructions) ☐					
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐				7	-3,000.
8	Other income from Schedule 1, line 10				8	3,800.
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income**				9	273,941.
10	Adjustments to income from Schedule 1, line 26				10	
11	Subtract line 10 from line 9. This is your **adjusted gross income**				11	273,941.
12	**Standard deduction or itemized deductions** (from Schedule A)				12	25,900.
13	Qualified business income deduction from Form 8995 or Form 8995-A				13	32.
14	Add lines 12 and 13				14	25,932.
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income**				15	248,009.

Standard Deduction for—
- Single or Married filing separately, $12,950
- Married filing jointly or Qualifying surviving spouse, $25,900
- Head of household, $19,400
- If you checked any box under *Standard Deduction*, see instructions.

Tax and Credits

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐		16	46,895.
17	Amount from Schedule 2, line 3		17	0.
18	Add lines 16 and 17		18	46,895.
19	Child tax credit or credit for other dependents from Schedule 8812		19	4,000.
20	Amount from Schedule 3, line 8		20	4,477.
21	Add lines 19 and 20		21	8,477.
22	Subtract line 21 from line 18. If zero or less, enter -0-		22	38,418.
23	Other taxes, including self-employment tax, from Schedule 2, line 21		23	353.
24	Add lines 22 and 23. This is your **total tax**		24	38,771.

Payments

If you have a qualifying child, attach Sch. EIC.

25	Federal income tax withheld from:				
a	Form(s) W-2	25a	41,115.		
b	Form(s) 1099	25b			
c	Other forms (see instructions)	25c	1.		
d	Add lines 25a through 25c			25d	41,116.
26	2022 estimated tax payments and amount applied from 2021 return			26	
27	Earned income credit (EIC) No	27			
28	Additional child tax credit from Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Reserved for future use	30			
31	Amount from Schedule 3, line 15	31			
32	Add lines 27, 28, 29, and 31. These are your **total other payments and refundable credits**			32	
33	Add lines 25d, 26, and 32. These are your **total payments**			33	41,116.

Refund

Direct deposit? See instructions.

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**			34	2,345.
35a	Amount of line 34 you want **refunded to you**. If Form 8888 is attached, check here ☐			35a	2,345.
b	Routing number 0 1 1 0 0 0 1 3 8 — **c** Type: ☒ Checking ☐ Savings				
d	Account number 0 0 9 5 1 4 6 4 3 2 7 4				
36	Amount of line 34 you want **applied to your 2023 estimated tax**	36			

Amount You Owe

37	Subtract line 33 from line 24. This is the **amount you owe**. For details on how to pay, go to *www.irs.gov/Payments* or see instructions			37	
38	Estimated tax penalty (see instructions)	38			

Third Party Designee

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

Designee's name | Phone no. | Personal identification number (PIN)

Sign Here

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

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		Software Engineer	
Spouse's signature. If a joint return, both must sign.	**Date**	**Spouse's occupation**	**If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)**
		Project Manager	
Phone no. (408)657-3748	Email address		

Paid Preparer Use Only

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

SCHEDULE 1 (Form 1040)

Department of the Treasury Internal Revenue Service

Additional Income and Adjustments to Income

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **01**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes			1	0.
2a	Alimony received			2a	
b	Date of original divorce or separation agreement (see instructions):				
3	Business income or (loss). Attach Schedule C			3	
4	Other gains or (losses). Attach Form 4797			4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E			5	
6	Farm income or (loss). Attach Schedule F			6	
7	Unemployment compensation			7	
8	Other income:				
a	Net operating loss	8a	( )		
b	Gambling	8b			
c	Cancellation of debt	8c			
d	Foreign earned income exclusion from Form 2555	8d	( )		
e	Income from Form 8853	8e			
f	Income from Form 8889	8f			
g	Alaska Permanent Fund dividends	8g			
h	Jury duty pay	8h			
i	Prizes and awards	8i			
j	Activity not engaged in for profit income	8j			
k	Stock options	8k			
l	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	8l			
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m			
n	Section 951(a) inclusion (see instructions)	8n			
o	Section 951A(a) inclusion (see instructions)	8o			
p	Section 461(l) excess business loss adjustment	8p			
q	Taxable distributions from an ABLE account (see instructions)	8q			
r	Scholarship and fellowship grants not reported on Form W-2	8r			
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	( )		
t	Pension or annuity from a nonqualifed deferred compensation plan or a nongovernmental section 457 plan	8t			
u	Wages earned while incarcerated	8u			
z	Other income. List type and amount: Other Income from box 3 of 1099-Misc 3,800.	8z	3,800.		
9	Total other income. Add lines 8a through 8z			9	3,800.
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8			10	3,800.

Part II Adjustments to Income

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

SCHEDULE 2
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Taxes

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

OMB No. 1545-0074

2022

Attachment Sequence No. **02**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE		4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5		
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6		
7	Total additional social security and Medicare tax. Add lines 5 and 6		7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐		8	
9	Household employment taxes. Attach Schedule H		9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required		10	
11	Additional Medicare Tax. Attach Form 8959		11	304.
12	Net investment income tax. Attach Form 8960		12	49.
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12		13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares		14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over $150,000		15	
16	Recapture of low-income housing credit. Attach Form 8611		16	

(continued on page 2)

Part II Other Taxes *(continued)*

17	Other additional taxes:		
a	Recapture of other credits. List type, form number, and amount:	**17a**	
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	**17b**	
c	Additional tax on HSA distributions. Attach Form 8889	**17c**	
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	**17d**	
e	Additional tax on Archer MSA distributions. Attach Form 8853 .	**17e**	
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	**17f**	
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	**17g**	
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A . . .	**17h**	
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	**17i**	
j	Section 72(m)(5) excess benefits tax	**17j**	
k	Golden parachute payments	**17k**	
l	Tax on accumulation distribution of trusts	**17l**	
m	Excise tax on insider stock compensation from an expatriated corporation	**17m**	
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	**17n**	
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	**17o**	
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	**17p**	
q	Any interest from Form 8621, line 24	**17q**	
z	Any other taxes. List type and amount:	**17z**	
18	Total additional taxes. Add lines 17a through 17z	**18**	
19	Reserved for future use	**19**	
20	Section 965 net tax liability installment from Form 965-A . . .	**20**	
21	Add lines 4, 7 through 16, and 18. These are your **total other taxes**. Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b	**21**	353.

SCHEDULE 3 (Form 1040)

Department of the Treasury Internal Revenue Service

Additional Credits and Payments

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **03**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required			1	175.
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441			2	
3	Education credits from Form 8863, line 19			3	
4	Retirement savings contributions credit. Attach Form 8880			4	
5	Residential energy credits. Attach Form 5695			5	4,302.
6	Other nonrefundable credits:				
a	General business credit. Attach Form 3800	6a			
b	Credit for prior year minimum tax. Attach Form 8801	6b			
c	Adoption credit. Attach Form 8839	6c			
d	Credit for the elderly or disabled. Attach Schedule R	6d			
e	Alternative motor vehicle credit. Attach Form 8910	6e			
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f			
g	Mortgage interest credit. Attach Form 8396	6g			
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h			
i	Qualified electric vehicle credit. Attach Form 8834	6i			
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j			
k	Credit to holders of tax credit bonds. Attach Form 8912	6k			
l	Amount on Form 8978, line 14. See instructions	6l			
z	Other nonrefundable credits. List type and amount:	6z			
7	Total other nonrefundable credits. Add lines 6a through 6z			7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20			8	4,477.

(continued on page 2)

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962			9	
10	Amount paid with request for extension to file (see instructions)			10	
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	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b			
c	Reserved for future use	13c			
d	Credit for repayment of amounts included in income from earlier years	13d			
e	Reserved for future use	13e			
f	Deferred amount of net 965 tax liability (see instructions)	13f			
g	Reserved for future use	13g			
h	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021	13h			
z	Other payments or refundable credits. List type and amount:	13z			
14	Total other payments or refundable credits. Add lines 13a through 13z			14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31			15	

SCHEDULE B (Form 1040)

Department of the Treasury Internal Revenue Service

Interest and Ordinary Dividends

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

OMB No. 1545-0074

2022

Attachment Sequence No. **08**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

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:

		Amount
wells fargo bank	1	36.98
NATIONAL FINANCIAL SERVICES LLC		0.43
loanDepot		17.33
BANK OF AMERICA, N.A.		24.10
loandepot com llc		103.42
CHARLES SCHWAB & CO., INC.		85.28
2 Add the amounts on line 1	2	267.54
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3	
4 Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b	4	267.54

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

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:

		Amount
Betterment Securities	5	229.42
CHARLES SCHWAB & CO., INC.		2,771.81
NATIONAL FINANCIAL SERVICES LLC		1,017.32
6 Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b	6	4,018.55

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 2022, 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	X	
	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) are located:		
8	During 2022, 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

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12**

Name(s) shown on return	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b	15,704.	17,149.		-1,445.
1b Totals for all transactions reported on Form(s) 8949 with **Box A** checked	179,682.	193,114.	7.	-13,425.
2 Totals for all transactions reported on Form(s) 8949 with **Box B** checked				
3 Totals for all transactions reported on Form(s) 8949 with **Box C** checked				

4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824	4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your **Capital Loss Carryover Worksheet** in the instructions	6	( )
7 **Net short-term capital gain or (loss).** Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back	7	-14,870.

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b	13.	17.		-4.
8b Totals for all transactions reported on Form(s) 8949 with **Box D** checked	36,496.	37,751.	3.	-1,252.
9 Totals for all transactions reported on Form(s) 8949 with **Box E** checked				
10 Totals for all transactions reported on Form(s) 8949 with **Box F** checked				

11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824	11	
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	
13 Capital gain distributions. See the instructions	13	236.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your **Capital Loss Carryover Worksheet** in the instructions	14	( )
15 **Net long-term capital gain or (loss).** Combine lines 8a through 14 in column (h). Then, go to Part III on the back	15	-1,020.

Part III **Summary**

16 Combine lines 7 and 15 and enter the result . . . . **16** -15,890.

- If line 16 is a **gain**, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.
- If line 16 is a **loss**, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.
- If line 16 is **zero**, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.

17 Are lines 15 and 16 **both** gains?

☐ **Yes.** Go to line 18.

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

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

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

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

☐ **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Form 1040, line 16. **Don't** complete lines 21 and 22 below.

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

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

- The loss on line 16; or
- ($3,000), or if married filing separately, ($1,500)

. . . . **21** (3,000.)

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

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

☒ **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Form 1040, line 16.

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

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social security number or taxpayer identification number: 024-88-7197

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.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
61.00 SCHWAB US SMALL CAP ETF	VARIOUS	01/21/22	5,649.	6,155.			-506.
102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	01/28/22	3,587.	3,937.			-350.
76.00 ISHARES CORE MSCI EMERGING ETF	08/19/21	02/24/22	4,223.	4,604.			-381.
184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	VARIOUS	02/24/22	5,423.	5,821.			-398.
134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	VARIOUS	03/04/22	4,071.	4,524.			-453.
70.00 SCHWAB INTERNATIONAL EQUITY ETF	VARIOUS	03/04/22	2,415.	2,787.			-372.
43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	VARIOUS	03/07/22	1,506.	1,805.			-299.
23.00 ISHARES CALIFORNIA MUNI BOND ETF	VARIOUS	04/14/22	1,309.	1,440.			-131.
257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	02/24/22	04/25/22	4,953.	5,423.			-470.
191.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	04/25/22	4,927.	5,365.			-438.
18.00 VANGUARD SMALL CAP ETF	01/21/22	04/28/22	3,532.	3,715.			-183.
94.00 SCHWAB US LARGE CAP ETF	VARIOUS	04/28/22	4,695.	4,791.			-96.
117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	01/28/22	05/06/22	3,693.	4,005.			-312.
29.00 XTRACKERS INTER REAL ESTETF	VARIOUS	05/09/22	678.	842.			-164.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked)			50,661.	55,214.			-4,553.

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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return	Social security number or taxpayer identification number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	VARIOUS	06/10/22	5,180.	5,484.			-304.
225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	04/25/22	06/13/22	5,901.	6,137.			-236.
126.00 ISHARES CORE MSCI EMERGING ETF	VARIOUS	06/13/22	6,168.	6,491.			-323.
135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	VARIOUS	06/13/22	7,052.	7,523.			-471.
11.00 VANGUARD SMALL CAP ETF	01/21/22	06/16/22	1,884.	2,271.			-387.
123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	03/04/22	06/16/22	5,015.	5,341.			-326.
130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	06/16/22	3,978.	4,278.			-300.
62.00 VANGUARD FTSE DEVELOPED MARKETS ETF	03/04/22	06/23/22	2,489.	2,804.			-315.
20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF	03/07/22	07/05/22	1,989.	2,316.			-327.
44.00 INVESCO FTSE RAFI US 1500 SMALL-MID	06/10/22	07/12/22	6,851.	7,133.			-282.
245.00 SCHWAB EMERGING MARKETS EQUITY ETF	06/13/22	07/14/22	5,935.	6,157.			-222.
355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	06/13/22	07/14/22	6,100.	6,613.			-513.
177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	VARIOUS	09/07/22	4,811.	5,095.			-284.
44.00 VANGUARD GLBAL EX US REAL ESTATE ETF	05/09/22	09/20/22	1,819.	2,018.			-199.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked)			65,172.	69,661.			-4,489.

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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return	Social security number or taxpayer identification number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

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

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

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

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	06/16/22	09/22/22	3,661.	3,957.			-296.
181.00 ISHARES CORE MSCI EMERGING ETF	07/14/22	09/23/22	8,051.	8,502.			-451.
63.00 INVESCO FTSE RAFI US 1000 ETF	VARIOUS	09/23/22	8,964.	9,526.			-562.
167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	VARIOUS	09/23/22	3,904.	4,219.			-315.
153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	VARIOUS	09/23/22	6,605.	6,993.			-388.
172.00 SCHWAB INTERNATIONAL EQUITY ETF	VARIOUS	09/23/22	4,924.	5,385.			-461.
89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	VARIOUS	09/27/22	2,430.	2,775.			-345.
248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	07/14/22	09/29/22	5,808.	6,094.			-286.
145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	VARIOUS	10/12/22	5,097.	5,502.			-405.
349.00 SCHWAB EMERGING MARKETS EQUITY ETF	09/23/22	10/24/22	7,517.	8,043.			-526.
211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	10/24/22	5,816.	6,052.			-236.
WARNER BROS DISCOVERY INC COM SE 0.004	05/18/21	04/13/22	0.	0.			0.
WARNER BROS DISCOVERY INC COM SE 0.018	05/18/21	04/13/22	0.	1.	W	0.	-1.
4.539722 sh. Schwab U.S. REIT ETF Class O	08/24/21	05/09/22	102.	108.	W	1.	-5.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked)			62,879.	67,157.		1.	-4,277.

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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return	Social security number or taxpayer identification number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
1.177394 sh. Vanguard FTSE Emerging Markets Class O	08/24/21	03/08/22	52.	60.	W	2.	-6.
0.003339 sh. Vanguard FTSE Emerging Markets Class O	09/02/21	01/31/22	0.	0.	W	0.	0.
0.002187 sh. Vanguard FTSE Emerging Markets Class O	09/02/21	01/31/22	0.	0.	W	0.	0.
0.010515 sh. Vanguard FTSE Emerging Markets Class O	09/02/21	01/31/22	1.	1.	W	0.	0.
0.051665 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	11/16/21	09/30/22	2.	3.	W	1.	0.
0.055983 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	12/16/21	11/30/22	2.	3.	W	1.	0.
0.054301 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	01/03/22	12/30/22	2.	3.	W	1.	0.
0.005795 sh. Vanguard Mid-Cap Value ETF Class O	01/03/22	02/28/22	1.	1.	W	0.	0.
0.043410 sh. Schwab U.S. REIT ETF Class O	01/04/22	03/31/22	1.	1.	W	0.	0.
0.006642 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	01/04/22	12/30/22	0.	0.	W	0.	0.
0.048733 sh. Vanguard FTSE Emerging Markets Class O	04/18/22	08/31/22	2.	2.	W	0.	0.
0.016970 sh. iShares Core S&P Total U.S. Stock Ma... Class O	06/13/22	06/30/22	1.	1.	W	0.	0.
17.128109 sh. iShares Core MSCI EAFE ETF Class O	08/30/22	09/30/22	904.	1,005.	W	1.	-100.
0.025072 sh. Vanguard REIT Index ETF Class O	09/22/22	10/31/22	2.	2.	W	0.	0.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) . .			970.	1,082.		6.	-106.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social security number or taxpayer identification number: 024-88-7197

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- [x] **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- [ ] **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
- [ ] **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions. (f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
4.00 SCHWAB US SMALL CAP ETF	01/06/21	01/21/22	370.	370.			0.
12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	01/06/21	01/28/22	422.	429.			-7.
12.00 SCHWAB INTERNATIONAL EQUITY ETF	03/02/21	03/04/22	414.	448.			-34.
42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	VARIOUS	03/04/22	1,276.	1,318.			-42.
25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	VARIOUS	03/07/22	876.	967.			-91.
48.00 ISHARES CALIFORNIA MUNI BOND ETF	VARIOUS	04/14/22	2,732.	2,959.			-227.
37.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	04/25/22	954.	1,015.			-61.
50.00 SCHWAB US LARGE CAP ETF	VARIOUS	04/28/22	2,498.	2,355.			143.
46.00 XTRACKERS INTER REAL ESTETF	VARIOUS	05/09/22	1,076.	1,278.			-202.
43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	VARIOUS	06/10/22	2,082.	2,252.			-170.
27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	VARIOUS	06/13/22	708.	775.			-67.
40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	VARIOUS	06/13/22	2,090.	2,186.			-96.
57.00 VANGUARD FTSE DEVELOPED MARKETS ETF	06/05/20	06/23/22	2,289.	2,307.			-18.
106.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	07/14/22	2,568.	2,640.			-72.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked)			20,355.	21,299.			-944.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social security number or taxpayer identification number: 024-88-7197

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- [x] **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- [ ] **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
- [ ] **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
8.00 VANGUARD GLBAL EX US REAL ESTATE ETF	VARIOUS	09/20/22	331.	447.			-116.
83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	VARIOUS	09/22/22	2,251.	2,263.			-12.
1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	10/02/20	09/23/22	23.	28.			-5.
7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	01/06/21	09/23/22	302.	316.			-14.
48.00 SCHWAB INTERNATIONAL EQUITY ETF	VARIOUS	09/23/22	1,374.	1,433.			-59.
1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	12/20/18	09/27/22	27.	29.			-2.
229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	VARIOUS	09/29/22	5,363.	5,391.			-28.
155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	06/22/20	10/12/22	5,449.	5,447.			2.
12.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	10/24/22	258.	271.			-13.
27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	10/24/22	744.	799.			-55.
WARNER BROS DISCOVERY INC COM SE 0.3	01/24/18	04/13/22	8.	11.	W	3.	0.
WARNER BROS DISCOVERY INC COM SE 0.018	06/08/20	04/13/22	0.	1.	W	0.	-1.
WARNER BROS DISCOVERY INC COM SE 0.024	11/16/20	04/13/22	1.	1.	W	0.	0.
WARNER BROS DISCOVERY INC COM SE 0.018	01/11/21	04/13/22	0.	1.	W	0.	-1.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) . .			16,131.	16,438.		3.	-304.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side	**Social security number or taxpayer identification number**
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
0.258829 sh. Vanguard FTSE Emerging Markets Class O	08/24/21	09/23/22	10.	14.	W	0.	-4.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked)			10.	14.		0.	-4.

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

SCHEDULE 8812 (Form 1040)

Department of the Treasury
Internal Revenue Service

Credits for Qualifying Children and Other Dependents

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **47**

Name(s) shown on return	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Child Tax Credit and Credit for Other Dependents

1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR			1	273,941.
2a	Enter income from Puerto Rico that you excluded	2a			
b	Enter the amounts from lines 45 and 50 of your Form 2555	2b	0.		
c	Enter the amount from line 15 of your Form 4563	2c			
d	Add lines 2a through 2c			2d	0.
3	Add lines 1 and 2d			3	273,941.
4	Number of qualifying children under age 17 with the required social security number	4	2		
5	Multiply line 4 by $2,000			5	4,000.
6	Number of other dependents, including any qualifying children who are not under age 17 or who do not have the required social security number	6	0		
	Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4.				
7	Multiply line 6 by $500			7	
8	Add lines 5 and 7			8	4,000.
9	Enter the amount shown below for your filing status. • Married filing jointly—$400,000 • All other filing statuses—$200,000			9	400,000.
10	Subtract line 9 from line 3. • If zero or less, enter -0-. • If more than zero and not a multiple of $1,000, enter the next multiple of $1,000. For example, if the result is $425, enter $1,000; if the result is $1,025, enter $2,000, etc.			10	0.
11	Multiply line 10 by 5% (0.05)			11	0.
12	Is the amount on line 8 more than the amount on line 11?			12	4,000.
	☐ **No. STOP.** You cannot take the child tax credit, credit for other dependents, or additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. ☒ **Yes.** Subtract line 11 from line 8. Enter the result.				
13	Enter the amount from the **Credit Limit Worksheet A**			13	42,418.
14	Enter the smaller of line 12 or 13. **This is your child tax credit and credit for other dependents** **Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.**			14	4,000.

If the amount on line 12 is more than the amount on line 14, you may be able to take the **additional child tax credit** on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27 (also complete Schedule 3, line 11) before completing Part II-A.

Part II-A Additional Child Tax Credit for All Filers

Caution: If you file Form 2555, you cannot claim the additional child tax credit.

15	Check this box if you **do not** want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27 ☐		
16a	Subtract line 14 from line 12. If zero, **stop here**; you cannot take the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27	16a	0.
b	Number of qualifying children under 17 with the required social security number: ________ x $1,500. Enter the result. If zero, **stop here**; you cannot claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27	16b	
	TIP: The number of children you use for this line is the same as the number of children you used for line 4.		
17	Enter the **smaller** of line 16a or line 16b	17	
18a	Earned income (see instructions) — 18a		
b	Nontaxable combat pay (see instructions) — 18b		
19	Is the amount on line 18a more than $2,500? ☐ **No.** Leave line 19 blank and enter -0- on line 20. ☐ **Yes.** Subtract $2,500 from the amount on line 18a. Enter the result — 19		
20	Multiply the amount on line 19 by 15% (0.15) and enter the result	20	
	Next. On line 16b, is the amount $4,500 or more? ☐ **No.** If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the **smaller** of line 17 or line 20 on line 27. ☐ **Yes.** If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. Otherwise, go to line 21.		

Part II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Residents of Puerto Rico

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

Part II-C Additional Child Tax Credit

27	**This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28**	27	

Form **8889**

Department of the Treasury
Internal Revenue Service

Health Savings Accounts (HSAs)

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **52**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR: LEELA SESHU REDDY CHEEDEPUDI

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions.: 024-88-7197

Before you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required.

Part I — HSA Contributions and Deduction.

See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse.

1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2022. See instructions	☐ Self-only ☒ Family	
2	HSA contributions you made for 2022 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2022. **Do not** include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions	2	0.
3	If you were under age 55 at the end of 2022 and, on the first day of **every** month during 2022, you were, or were considered, an eligible individual with the **same** coverage, enter $3,650 ($7,300 for family coverage). **All others**, see the instructions for the amount to enter	3	7,300.
4	Enter the amount you and your employer contributed to your Archer MSAs for 2022 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2022, also include any amount contributed to your spouse's Archer MSAs	4	0.
5	Subtract line 4 from line 3. If zero or less, enter -0-	5	7,300.
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2022, see the instructions for the amount to enter	6	7,300.
7	If you were age 55 or older at the end of 2022, married, and you or your spouse had family coverage under an HDHP at any time during 2022, enter your additional contribution amount. See instructions	7	
8	Add lines 6 and 7	8	7,300.
9	Employer contributions made to your HSAs for 2022 — 9		
10	Qualified HSA funding distributions — 10		
11	Add lines 9 and 10	11	
12	Subtract line 11 from line 8. If zero or less, enter -0-	12	7,300.
13	**HSA deduction.** Enter the **smaller** of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13	13	0.
	Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.		

Part II — HSA Distributions.

If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part II for each spouse.

14a	Total distributions you received in 2022 from all HSAs (see instructions)	14a	
b	Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions	14b	
c	Subtract line 14b from line 14a	14c	
15	Qualified medical expenses paid using HSA distributions (see instructions)	15	
16	**Taxable HSA distributions.** Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f	16	
17a	If any of the distributions included on line 16 meet any of the **Exceptions to the Additional 20% Tax** (see instructions), check here ☐		
b	**Additional 20% tax** (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c	17b	

Part III — Income and Additional Tax for Failure To Maintain HDHP Coverage.

See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse.

18	Last-month rule	18	0.
19	Qualified HSA funding distribution	19	
20	**Total income.** Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f	20	0.
21	**Additional tax.** Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d	21	

Form **8995**

Department of the Treasury
Internal Revenue Service

Qualified Business Income Deduction Simplified Computation

Attach to your tax return.

Go to *www.irs.gov/Form8995* for instructions and the latest information.

OMB No. 1545-2294

2022

Attachment Sequence No. **55**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your taxpayer identification number: 024-88-7197

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 $170,050 ($340,100 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			
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	158.		
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	158.		
9	REIT and PTP component. Multiply line 8 by 20% (0.20)			9	32.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9			10	32.
11	Taxable income before qualified business income deduction (see instructions)	11	248,041.		
12	Net capital gain (see instructions)	12	3,309.		
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	244,732.		
14	Income limitation. Multiply line 13 by 20% (0.20)			14	48,946.
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	32.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-			16	(0.)
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-			17	(0.)

Form **8959**

Department of the Treasury
Internal Revenue Service

Additional Medicare Tax

If any line does not apply to you, leave it blank. See separate instructions.
Attach to Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.
Go to *www.irs.gov/Form8959* for instructions and the latest information.

OMB No. 1545-0074
2022
Attachment Sequence No. 71

Name(s) shown on return	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	283,827.		
2	Unreported tips from Form 4137, line 6	2			
3	Wages from Form 8919, line 6	3			
4	Add lines 1 through 3	4	283,827.		
5	Enter the following amount for your filing status: Married filing jointly . . . $250,000 Married filing separately . . . $125,000 Single, Head of household, or Qualifying surviving spouse . . . $200,000	5	250,000.		
6	Subtract line 5 from line 4. If zero or less, enter -0-			6	33,827.
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II			7	304.

Part II Additional Medicare Tax on Self-Employment Income

8	Self-employment income from Schedule SE (Form 1040), Part I, line 6. If you had a loss, enter -0- (Form 1040-PR or 1040-SS filers, see instructions.)	8			
9	Enter the following amount for your filing status: Married filing jointly . . . $250,000 Married filing separately . . . $125,000 Single, Head of household, or Qualifying surviving spouse . . . $200,000	9			
10	Enter the amount from line 4	10			
11	Subtract line 10 from line 9. If zero or less, enter -0-	11			
12	Subtract line 11 from line 8. If zero or less, enter -0-			12	
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III			13	

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RRTA) Compensation

14	Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14			
15	Enter the following amount for your filing status: Married filing jointly . . . $250,000 Married filing separately . . . $125,000 Single, Head of household, or Qualifying surviving spouse . . . $200,000	15			
16	Subtract line 15 from line 14. If zero or less, enter -0-			16	
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV			17	

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-PR or 1040-SS filers, see instructions), and go to Part V	18	304.

Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	4,116.		
20	Enter the amount from line 1	20	283,827.		
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	4,115.		
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages			22	1.
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)			23	
24	**Total Additional Medicare Tax withholding.** Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-PR or 1040-SS filers, see instructions)			24	1.

Form **8960**

Department of the Treasury
Internal Revenue Service

Net Investment Income Tax— Individuals, Estates, and Trusts

Attach to your tax return.

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

OMB No. 1545-2227

2022

Attachment Sequence No. **72**

Name(s) shown on your tax return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number or EIN: 024-88-7197

Part I Investment Income

☐ Section 6013(g) election (see instructions)
☐ Section 6013(h) election (see instructions)
☐ Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions)			1	268.
2	Ordinary dividends (see instructions)			2	4,019.
3	Annuities (see instructions)			3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a			
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b			
c	Combine lines 4a and 4b			4c	
5a	Net gain or loss from disposition of property (see instructions)	5a	-3,000.		
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b			
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c			
d	Combine lines 5a through 5c			5d	-3,000.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)			6	
7	Other modifications to investment income (see instructions)			7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7			8	1,287.

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see instructions)	9a			
b	State, local, and foreign income tax (see instructions)	9b			
c	Miscellaneous investment expenses (see instructions)	9c			
d	Add lines 9a, 9b, and 9c			9d	
10	Additional modifications (see instructions)			10	
11	Total deductions and modifications. Add lines 9d and 10			11	

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13–17. Estates and trusts, complete lines 18a–21. If zero or less, enter -0-			12	1,287.
	Individuals:				
13	Modified adjusted gross income (see instructions)	13	273,941.		
14	Threshold based on filing status (see instructions)	14	250,000.		
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	23,941.		
16	Enter the smaller of line 12 or line 15			16	1,287.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). **Enter here and include on your tax return** (see instructions)			17	49.
	Estates and Trusts:				
18a	Net investment income (line 12 above)	18a			
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b			
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-	18c			
19a	Adjusted gross income (see instructions)	19a			
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b			
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c			
20	Enter the smaller of line 18c or line 19c			20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). **Enter here and include on your tax return** (see instructions)			21	

Form **5695**

Department of the Treasury
Internal Revenue Service

Residential Energy Credits

Go to *www.irs.gov/Form5695* for instructions and the latest information.
Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074
2022
Attachment Sequence No. **158**

Name(s) shown on return	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I **Residential Clean Energy Credit** (See instructions before completing this part.)

Note: Skip lines 1 through 11 if you only have a **credit carryforward from 2021**.

1	Qualified solar electric property costs	1	14,339.
2	Qualified solar water heating property costs	2	
3	Qualified small wind energy property costs	3	
4	Qualified geothermal heat pump property costs	4	
5	Qualified biomass fuel property costs	5	
6a	Add lines 1 through 5	6a	14,339.
b	Multiply line 6a by 30% (0.30)	6b	4,302.
7a	Qualified fuel cell property. Was qualified fuel cell property installed on, or in connection with, your main home located in the United States? (See instructions.)	7a	☐ Yes ☒ No

Caution: If you checked the "No" box, you cannot take a credit for qualified fuel cell property. Skip lines 7b through 11.

b Print the complete address of the main home where you installed the fuel cell property.

Number and street Unit No.

City, State, and ZIP code

8	Qualified fuel cell property costs	8			
9	Multiply line 8 by 30% (0.30)	9			
10	Kilowatt capacity of property on line 8 above ______	10			
11	Enter the smaller of line 9 or line 10			11	
12	Credit carryforward from 2021. Enter the amount, if any, from your 2021 Form 5695, line 16			12	
13	Add lines 6b, 11, and 12			13	4,302.
14	Limitation based on tax liability. Enter the amount from the Residential Clean Energy Credit Limit Worksheet (see instructions)			14	45,720.
15	**Residential clean energy credit.** Enter the smaller of line 13 or line 14. Also include this amount on Schedule 3 (Form 1040), line 5			15	4,302.
16	Credit carryforward to 2023. If line 15 is less than line 13, subtract line 15 from line 13	16			

Part II **Energy Efficient Home Improvement Credit**

17a	Were the qualified energy efficiency improvements or residential energy property costs for your main home located in the United States? (see instructions)	**17a**	☒ Yes ☐ No
	Caution: If you checked the "No" box, you cannot claim the energy efficient home improvement credit. Do not complete Part II.		
b	Print the complete address of the main home where you made the qualifying improvements. **Caution:** You can only have one main home at a time. 1928 Everglades Dr Number and street Unit No. Milpitas CA 95035-6612 City, State, and ZIP code		
c	Were any of these improvements related to the construction of this main home?	**17c**	☒ Yes ☐ No
	Caution: If you checked the "Yes" box, you can only claim the energy efficient home improvement credit for qualifying improvements that were not related to the construction of the home. Do not include expenses related to the construction of your main home, even if the improvements were made after you moved into the home.		
18	Lifetime limitation. Enter the amount from the Lifetime Limitation Worksheet (see instructions)	**18**	
19	Qualified energy efficiency improvements (original use must begin with you and the component must reasonably be expected to last for at least 5 years; do not include labor costs) (see instructions).		
a	Insulation material or system specifically and primarily designed to reduce heat loss or gain of your home that meets the prescriptive criteria established by the 2009 IECC	**19a**	
b	Exterior doors that meet or exceed the version 6.0 Energy Star program requirements	**19b**	
c	Metal or asphalt roof that meets or exceeds the Energy Star program requirements and has appropriate pigmented coatings or cooling granules which are specifically and primarily designed to reduce the heat gain of your home	**19c**	
d	Exterior windows and skylights that meet or exceed the version 6.0 Energy Star program requirements — **19d**		
e	Maximum amount of cost on which the credit can be figured — **19e** $2,000		
f	If you claimed window expenses on your Form 5695 prior to 2022, enter the amount from the Window Expense Worksheet (see instructions); otherwise enter -0- — **19f** 0.		
g	Subtract line 19f from line 19e. If zero or less, enter -0- — **19g** 2,000.		
h	Enter the smaller of line 19d or line 19g	**19h**	0.
20	Add lines 19a, 19b, 19c, and 19h	**20**	0.
21	Multiply line 20 by 10% (0.10)	**21**	0.
22	Residential energy property costs (must be placed in service by you; include labor costs for onsite preparation, assembly, and original installation) (see instructions).		
a	Energy-efficient building property. Do not enter more than **$300**	**22a**	0.
b	Qualified natural gas, propane, or oil furnace or hot water boiler. Do not enter more than **$150**	**22b**	0.
c	Advanced main air circulating fan used in a natural gas, propane, or oil furnace. Do not enter more than **$50**	**22c**	0.
23	Add lines 22a through 22c	**23**	0.
24	Add lines 21 and 23	**24**	0.
25	Maximum credit amount. (If you jointly occupied the home, see instructions)	**25**	500.
26	Enter the amount, if any, from line 18	**26**	
27	Subtract line 26 from line 25. If zero or less, **stop;** you cannot take the energy efficient home improvement credit	**27**	500.
28	Enter the smaller of line 24 or line 27	**28**	0.
29	Limitation based on tax liability. Enter the amount from the Energy Efficient Home Improvement Credit Limit Worksheet (see instructions)	**29**	46,720.
30	**Energy efficient home improvement credit.** Enter the smaller of line 28 or line 29. Also include this amount on Schedule 3 (Form 1040), line 5	**30**	0.

SCHEDULE D AMT

Capital Gains and Losses as Refigured for the Alternative Minimum Tax

► Keep for your records

2022

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

Part I Short-Term Capital Gains and Losses — Assets Held One Year or Less

QuickZoom to Form(s) 8949, Short-Term Gain (Loss) Transactions ►
QuickZoom to Schedule D, Short-Term Gain (Loss) Regular Tax Totals ►

Short-Term Totals:	Sales Price	Adjstd Basis	Gn(Ls) Adjstmt	Gain (Loss)
1 a 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	15,704.	17,149.		-1,445.
b Short-term totals from all Forms 8949 with box A checked	179,682.	193,114.	7.	-13,425.
2 Short-term totals from all Forms 8949 with box B checked				
3 Short-term totals from all Forms 8949 with box C checked				

4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824:
- **A** Form(s) 6252, Installment Sale Income
- **B** Form(s) 4684, Casualties and Thefts
- **C** Form(s) 6781, Gains and Losses from Section 1256 Contracts and Straddles
- **D** Form(s) 8824, Like-Kind Exchanges
- **E** Sale of Incentive Stock Option stock (not entered elsewhere)
- **F** Other

Total . . . **4**

5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . **5**

6 Short-term capital loss carryover. Enter the amount, if any, from line 10 of your **Capital Loss Carryover Worksheet** . . . **6**

7 **Net short-term capital gain or (loss).** Combine lines 1 thru 6 in column (f) ► **7** -14,870.

Part II Long-Term Capital Gains and Losses — Assets Held More Than One Year

QuickZoom to Form(s) 8949, Long-Term Gain (Loss) Transactions ►
QuickZoom to Schedule D, Long-Term Gain (Loss) Regular Tax Totals ►

Long-Term Totals:	Sales Price	Adjstd Basis	Gn(Ls) Adjstmt	Gain (Loss)
8 a 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	13.	17.		-4.
b Long-term totals from all Forms 8949 with box D checked	36,486.	37,737.	3.	-1,248.
9 Long-term totals from all Forms 8949 with box E checked				
10 Long-term totals from all Forms 8949 with box F checked				

11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824:

- **A** Form 4797, Sales of Business Property (Gain from Pt I) . . . . ______
- **B** Form(s) 6252, Installment Sale Income . . . . ______
- **C** Form(s) 4684, Casualties and Thefts . . . . ______
- **D** Form(s) 6781, Gains and Losses from Section 1256 Contracts and Straddles . . . . ______
- **E** Form(s) 8824, Like-Kind Exchanges . . . . ______
- **F** Form(s) 2439, Notice to Shareholder of Undistributed Long-Term Capital Gains . . . . ______
- **G** Sale of Incentive Stock Option stock (not entered elsewhere) . . . . ______
- **H** Other . . . . ______

Total . . . . **11** ______

12	Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	
13	Capital gain distributions	13	236.
14	Long-term capital loss carryover. Enter the amount, if any, from line 15 of your **Capital Loss Carryover Worksheet**	14	
15	**Net long-term capital gain or (loss).** Combine lines 8 thru 14 in column (f) ►	15	-1,016.

Part III Summary

16 Combine lines 7 and 15 and enter the result . . . . **16** -15,886.

If line 16 is:

- A **gain,** enter the amount on line 22 below. Then go to line 17 below.
- A **loss,** skip lines 17 through 20 below. Then go to line 21.
- **Zero,** skip lines 17 through 21 below and enter -0- on line 22 below.

17 Are lines 15 and 16 **both** gains?

☐ **Yes.** Go to line 18.

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

18 Enter the amount, if any, from line 7 of the **28% Rate Gain Worksheet** . . . . . . **18** 0.

19 Enter the amount, if any, from line 18 of the **Unrecaptured Section 1250 Gain Worksheet** . . . . **19** 0.

20 Are lines 18 and 19 **both** zero or blank?

☐ **Yes.**

☐ **No.**

21 If line 16 is a loss, enter here and on line 22 below, the **smaller** of:

- The loss on line 16, or
- ($3,000), or, if married filing separately, ($1,500) . . . . **21** -3,000.

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

22 Do you have qualified dividends on Form 1040, line 9b?

☐ **Yes.**

☐ **No.**

Capital gain (loss) as refigured for the Alternative Minimum Tax. If line 16 is a gain or zero, enter line 16. If line 16 is a loss, enter line 21. . . . . ► -3,000.

QuickZoom to the **Qualified Dividends and Capital Gain Tax Worksheet** . . . . ►
QuickZoom to the **Schedule D Tax Worksheet** . . . . ►
QuickZoom to the **Unrecaptured Section 1250 Gain Worksheet** . . . . ►
QuickZoom to the **28% Rate Gain Gain Worksheet** . . . . ►
QuickZoom to the **Capital Loss Carryover Worksheet** . . . . ►
QuickZoom to **Form 6251, Alternative Minimum Tax** . . . . ►

Alternative Minimum Tax

Tax History Report

2022

► Keep for your records

Name(s) Shown on Return
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

	Five Year Tax History:				
	2018	**2019**	**2020**	**2021**	**2022**
Filing status			MFJ	MFJ	MFJ
Total income			447,644.	348,709.	273,941.
Adjustments to income			2,100.		
Adjusted gross income			445,544.	348,709.	273,941.
Tax expense			10,084.	10,165.	10,000.
Interest expense			15,490.	13,643.	14,153.
Contributions			1,227.	225.	699.
Misc. deductions					
Other itemized ded'ns					
Total itemized/ standard deduction			26,801.	25,325.	25,900.
Exemption amount			0.	0.	0.
QBI deduction			17.	21.	32.
Taxable income			418,726.	323,363.	248,009.
Tax			95,868.	65,375.	46,895.
Alternative min tax					
Total credits			1,700.		8,477.
Other taxes			1,910.	1,149.	353.
Payments			80,692.	73,874.	41,116.
Form 2210 penalty			101.		
Amount owed			15,487.		
Applied to next year's estimated tax					
Refund				7,350.	2,345.
Effective tax rate %			21.14	17.60	14.02
**Tax bracket %			35.0	24.0	24.0

**Tax bracket % is based on Taxable income.

Audit Defense Order Confirmation

Thank you for choosing Audit Defense for your 2022 income tax return. This service is provided by an independent tax firm TaxAudit.com, a service of TaxResources, Inc.

Name:	LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA
Confirmation Number:	5973587260
Amount Paid:	45.00

When TaxAudit.com defends your income tax return during an IRS or state audit, you have professional representation throughout the entire process.

TaxAudit.com:

- Defends your 2022 income tax return in an audit through the highest level of appeals
- Schedules and attends all audit appointments
- Reviews your tax return for additional problem areas
- Reviews your source documentation before the tax agency sees it
- Handles all audit correspondence and makes all audit phone calls
- Prepares requests for appeals conferences and U.S. Tax Court Petition, if necessary
- Minimizes the financial impact of an audit

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3. View and print your certificate at *http://intuit.taxaudit.com*
4. To ensure you receive your confirmation email, please add *AuditDefenseCertificates@taxaudit.com* to your email address book

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IMPORTANT: If you're **filing by mail** and **did not pay** for Audit Defense with a credit card, your order will not go through. We recommend going back and either e-filing your return or paying by credit card.

If you receive any audit or tax notice from the IRS or state taxing agency, contact TaxAudit.com immediately at 877-829-9695. TaxAudit.com's customer service office hours are 8 a.m. to 5 p.m. Pacific Time, Monday through Friday. TaxAudit.com must be your only contact with the IRS or state (please read the Audit Defense Membership Agreement).

For more information, or to purchase Audit Defense for other tax returns, visit TaxAudit.com's website at *http://intuit.taxaudit.com.*

Schedule 1
Line 8

Other Income Statement

2022

Statement L8

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security Number: 024-88-7197

		(a) Taxpayer	(b) Spouse
a	Net operating loss carryover from a prior year		
b 1	Winnings from Form W-2G		
2	Gambling winnings not reported on Form W-2G		
3	Total gambling winnings		
c	Income from the Cancellation of Debt:		
1	From Form 1099-C:		
	a Amount of debt canceled from box 2		
	b Amount of canceled debt excluded from income		
	c Taxable amount of canceled debt		
2	From Schedule(s) K-1		
d	Foreign earned income and housing exclusion, from Form 2555		
e	Taxable distributions from Form 8853:		
1	Taxable Archer MSA distributions — MSA		
2	Taxable Medicare Advantage distributions — Med MSA		
3	Taxable long term care distributions — LTC		
4	Total Form 8853		
f	Form 8889, Health Savings Accounts		
1	Taxable HSA Distributions from Form 1099-SA		
2	Last month rule and qualified HSA funding distribution amt		
3	Total Form 8889		
g	Alaska Permanent Fund		
h	Jury duty pay		
i 1	Winnings (prizes, etc.) from Form 1099-MISC, box 3		
2	Other non-gambling awards and prizes		
j	Income from "not for profit" activities (hobbies):		
1	Hobby income from Form 1099-K		
2	Other hobby income not reported elsewhere		
3	Total income from "not for profit" activities (hobbies):		
j	Does not apply to Form 1040NR		
k	Employer stock compensation income for non-employee		
l	Income from rental of personal property		
1	Rent from personal property from Form 1099-MISC box 1		
2	Rent from personal property from Form 1099-K box 1		
3	Other rent from personal property		
4	Total Income from the rental of personal property		
m	Olympic/Paralympic medals and USOC prize money**		
n	Section 965 deferred foreign income (Form 965)		
o	Global intangible low-taxed income (Form 8992)		
p	Limitation on business losses (Form 461)		
q	ABLE account distributions		
r	Scholarship and fellowship grants not reported on Form W-2		
s	Nontaxable amount of Medicaid waiver payments		
t	Nonqualified pension/annuity		
u	Wages while incarcerated		

z 1	Child's investment income, from Form 8814		
2	Taxable income from Forms 1099-MISC:		
a	Substitute payments in lieu of interest or dividends		
b	Other income from 1099-MISC box 3 (Excluding Olympic prize money)	3,800.	
c	Tribal Gaming		
3	Non-Employee Compensation from Form 1099-NEC box 1		
4	Taxable income from Form 1099-Q or 1099-QA:		
a	Qualified tuition program distributions		
b	Coverdell ESA distributions		
5	Taxable income from Form 1099-G:		
a	Grants		
b	RTAA payments		
6	Other income, from Schedule(s) K-1		
7	Refunds or reimbursements of deductions claimed in a prior year:		
a	Reimbursement for deducted medical expenses		
b	Refunds of deducted taxes (not state or local income taxes)		
	Type of Tax / State or Local ID		
c	Recapture of deducted moving expenses		
d	Reimbursement for deducted casualty or theft loss		
e	Reimbursement for deducted employee business expenses		
f	Other refunds or reimbursements		
8	Recoveries of bad debts deducted in a prior year		
9	Bartering income not reported elsewhere		
10	Other income on Form 1099-K (payment network transactions):		
11	Unemployment income and repayment		
a	Union unemployment benefits		
b	Private fund unemployment benefits		
c	State employee unemployment benefits		
d	Repayment of non-government unemployment benefits		
12	Other taxable income:		
13	Income from Community Property:		
a	Positive community property adjustment		
b	Negative community property adjustment (enter as positive)		

aa Exclusions from Gross Income

The excludable items below from Form 1099 are included on Schedule 1, line 8z, along with a corresponding negative adjustment to remove from gross income.

a	CA Middle Class Tax Refund payment		
b	Incorrect Form 1099-K		
c	Loss from Sale of Personal Items Reported on Form 1099-K		

Total. Add lines **a** through **z**. (Do not include **aa**.) Enter here and on Schedule 1, line 9	3,800.	

Charitable Organization Worksheet

2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Charity Name . . . Goodwill
Address . . . . . . 311 W Calaveras Blvd
City. . . . . Milpitas State . . . . CA ZIP code . . 95035

Combined Amounts Worksheet

Note: Amounts entered in worksheets below will be summarized in this worksheet**.**

Ref. No.	Date	Donation Description	Donation Type	Donation Amount
1	02/14/2022	Cloths, housewares, furniture	Items you valued	500.00
			Total:	500.00
			Prior Year Total:	

ItsDeductible Item Donations Worksheet

Note: Amounts in this worksheet can only be entered using the interview process.

Ref. No.	Donat. Date	VM*	Item Description	High Value	Qty.	Med. Value	Qty.	Total Value

* VM, Valuation Method. 1 indicates it has been valued by ItsDeductible, 0 indicates you have created a custom valuation item.

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA 024-88-7197

Other Item Donations Worksheet

Note: Double-click to enter additional information if needed.

Ref. No.	Donated Date / Acquired Date	Donation Description / Donation Type / How Acquired	Donation Cost / How Valued / Donation Value	Donation Allowed
1	02/14/2022 Various	Cloths, housewares, furniture A - Household Purchase	6,000.00 Thrift shop value 500.00	500.00

Detail of Money Donations Worksheet

Ref. No.	Donat. Date	Each Don. Amt	Don. Per Yr	Once or Recurring	2022 Amount
				Once Recur	
				Once Recur	
				Once Recur	
				Once Recur	
				Once Recur	

Detail of Mileage and Transportation Costs Worksheet

Ref. No. / Miles Per Trip / Other Costs	Donation Date / Trips Per Yr	Description of Trip / Once or Recurring / Description of Other Costs	Miles Driven / Value of Miles	Total Donation Value
		Once Recur		
		Once Recur		
		Once Recur		

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA 024-88-7197

Detail of Stock Donations Worksheet

Ref. No.	Date of Donation	Stock Symbol, # shares	Value on Donation Date	Date Acquired	Stock Original Cost	Donation Value

Charitable Organization Questions

1 Was the **entire interest** given for all property donated to this charity? . . . . [X] **Yes** [ ] **No**

2 Were **restrictions** attached to the charity's right to use or dispose of any property donated to this charity? . . . . ► [ ] **Yes** [X] **No**

3 Did you give to anyone other than this charity the right to income from any of the donated property or to possession of any of the donated property? . . . . . ► [ ] **Yes** [X] **No**

4 What Type of charitable organization was it? Check one:
[X] **(a)** 50% charity [ ] **(b**) Other than 50% charity [ ] **(c)** 50% Charity, 100% donation

Charitable Organization Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Charity Name . . . India Heritage Foundation

Address . . . . . .

City. . . . . State . . . . ZIP code . .

Combined Amounts Worksheet

Note: Amounts entered in worksheets below will be summarized in this worksheet.

Ref. No.	Date	Donation Description	Donation Type	Donation Amount
1	Various		Money	97.72
			Total:	97.72
			Prior Year Total:	

ItsDeductible Item Donations Worksheet

Note: Amounts in this worksheet can only be entered using the interview process.

Ref. No.	Donat. Date	VM*	Item Description	High Value	Qty.	Med. Value	Qty.	Total Value

* VM, Valuation Method. 1 indicates it has been valued by ItsDeductible, 0 indicates you have created a custom valuation item.

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA 024-88-7197

Other Item Donations Worksheet

Note: Double-click to enter additional information if needed.

Ref. No.	Donated Date / Acquired Date	Donation Description / Donation Type / How Acquired	Donation Cost / How Valued / Donation Value	Donation Allowed

Detail of Money Donations Worksheet

Ref. No.	Donat. Date	Each Don. Amt	Don. Per Yr	Once or Recurring	2022 Amount
1	Various	97.72	1	[ ] Once [X] Recur	97.72
				[ ] Once [ ] Recur	
				[ ] Once [ ] Recur	
				[ ] Once [ ] Recur	
				[ ] Once [ ] Recur	

Detail of Mileage and Transportation Costs Worksheet

Ref. No. / Miles Per Trip / Other Costs	Donation Date / Trips Per Yr	Description of Trip / Once or Recurring / Description of Other Costs	Miles Driven / Value of Miles	Total Donation Value
		[ ] Once [ ] Recur		
		[ ] Once [ ] Recur		
		[ ] Once [ ] Recur		

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA 024-88-7197

Detail of Stock Donations Worksheet

Ref. No.	Date of Donation	Stock Symbol, # shares	Value on Donation Date	Date Acquired	Stock Original Cost	Donation Value

Charitable Organization Questions

1 Was the **entire interest** given for all property donated to this charity? . . . . [X] **Yes** [ ] **No**

2 Were **restrictions** attached to the charity's right to use or dispose of any property donated to this charity? . . . . ► [ ] **Yes** [X] **No**

3 Did you give to anyone other than this charity the right to income from any of the donated property or to possession of any of the donated property? . . . . . ► [ ] **Yes** [X] **No**

4 What Type of charitable organization was it? Check one:
[X] **(a)** 50% charity [ ] **(b)** Other than 50% charity [ ] **(c)** 50% Charity, 100% donation

Federal Information Worksheet 2022

► Keep for your records

Part I – Personal Information

Information in Part I is **completely calculated** from entries on Personal Information Worksheets.

Taxpayer:

First name . . . . LEELA SESHU REDDY
Middle initial . . . . . . Suffix . . . . . .
Last name . . . . CHEEDEPUDI
Social security no. . . 024-88-7197
Occupation . . . . . . Software Engineer
Date of birth . . . . . . 12/11/1978 (mm/dd/yyyy)
Age as of 1-1-2023 . . 44
Daytime phone . . . . (408)657-3748 Ext
Legally blind . . . . . . ☐
Date of death . . . . .

Dependent of Someone Else:
Can taxpayer be claimed as dependent of another person (such as parent)? . . ☐ Yes ☒ No
If yes, **was** taxpayer claimed as dependent on that person's return? . . . . ☐ Yes ☐ No

Credit for the Elderly or Disabled (Schedule R):
Is the taxpayer retired on total and permanent disability? . . ☐ Yes ☐ No

Presidential Election Campaign Fund:
Does the taxpayer want $3 to go to the Presidential Election Campaign Fund? . . ☐ Yes ☐ No

Spouse:

First name . . . . VANI
Middle initial . . . . . . Suffix . . . . . .
Last name . . . . YENUMULA
Social security no. . . . 382-35-7565
Occupation . . . . Project Manager
Date of birth . . . . . . 10/22/1982 (mm/dd/yyyy)
Age as of 1-1-2023 . . 40
Daytime phone . . . . . Ext
Legally blind . . . . . . ☐
Date of death . . . . . .

Dependent of Someone Else:
Can spouse be claimed as dependent of another person (such as parent)? . . ☐ Yes ☒ No
If yes, **was** spouse claimed as dependent on that person's return? . . . . ☐ Yes ☐ No

Credit for the Elderly or Disabled (Schedule R):
Is the spouse retired on total and permanent disability? . . ☐ Yes ☐ No

Presidential Election Campaign Fund:
Does the spouse want $3 to go to the Presidential Election Campaign Fund? . . ☐ Yes ☐ No

Part II – Address and Federal Filing Status (enter information in this section)

US Address:
Address . . . . . . 1928 Everglades Dr Apt no. . .
City. . . . . Milpitas State . . . . CA ZIP code . . 95035-6612
Foreign Address: Check this box to use foreign address . . ► ☐
Address . . . . . . Apt no. . .
City. . . . .
Foreign code . . . Foreign country . . .
Foreign province/county Foreign postal code

APO/FPO/DPO address, check if appropriate . . . . APO ☐ FPO ☐ DPO ☐

Home phone . . .
Check to print phone number on Form 1040 . . . . ☐ Home ☒ Taxpayer daytime ☐ Spouse daytime

Print Form 1040-SR instead of Form 1040 . . . . ☐ Yes ☒ No

Federal filing status:

☐ **1** Single
☒ **2** Married filing jointly
☐ **3** Married filing separately
Check this box if you **did not** live with your spouse at any time during the year. . . . . ► ☐
Check this box if you are eligible to claim your spouse's exemption/blind/over age 65 (see Help) . . . . . ► ☐
☐ **4** Head of household
If the 'qualifying person' is your child but **not** your dependent:
Child's First name MI Last Name Suff
Child's social security number . .
☐ **5** Qualifying surviving spouse
Check the appropriate box for the year your spouse died . . . . 2020 ► ☐ 2021 ► ☐
Are you a dependent with a qualifying child . . . . Yes ► ☐ No ► ☐
Enter qualifying person's name:
Child's First name MI Last Name Suff
Child's social security number . .

Part III – Dependent/Earned Income Credit/Child and Dependent Care Credit Information

Information in Part III is completely calculated from entries on Dependent/Nondependent Info Worksheets.

First name / Last name	MI / Suff	Social security number / Relationship	Date of birth (mm/dd/yyyy) / Age	Code	**Not** qual for child tax cr	Date of death (mm/dd/yyyy) / Qualified child/dep care exps incurred and paid 2022	EIC	Lived with taxpyr in U.S.	**Not** qual credit other dep / Educ Tuitn and Fees	* Dep
PRATEEK CHEEDEPUDI	R	380-35-5303 Son	08/23/2008 14	L			E	12		Yes
TARA CHEEDEPUDI	R	768-47-7952 Daughter	02/26/2013 9	L			E	12		Yes

* "Yes" - qualifies as dependent, "No" - does not qualify as dependent

Part IV — Earned Income Credit Information (you must answer these questions to calculate EIC)

Is the taxpayer or spouse a qualifying child for EIC for another person? . . . . ► [ ] Yes [ ] No

Was the taxpayer's (and spouse's if married filing jointly) home in the United States for more than half of 2022? . . . ► [ ] Yes [ ] No

If the SSN of the taxpayer, or spouse if married filing jointly, was obtained to get a federally funded benefit, such as Medicaid, and the Social Security card contains the legend **Not Valid for Employment**, check this box (see Help) . . . . . . ► [ ]

Check if you are filing head of household **and** your spouse is a nonresident alien **and** you lived with your spouse during the last six months of 2022 . . . ► [ ]

Check if you were notified by the IRS that EIC cannot be claimed in 2022 or if you are ineligible to claim the EIC in 2022 for any other reason . . . ► [ ]

Part V — Direct Deposit or Direct Debit Information (not applicable for Form 9465)

Do you want to elect **direct deposit** of any federal tax refund? . . . ► [X] Yes [ ] No

Do you want to elect **direct debit** of federal balance due (Electronic filing only)? . . . ► [ ] Yes [X] No

If you selected either of the options above, fill out the information below:
Name of Financial Institution (optional) . . . . . . ► Bank of America
Check the appropriate box . . . . ► Checking [X] Savings [ ]
Routing number . . . . . . ► 011000138 Account number . . . . . ► 009514643274

Enter the following information only if you are requesting direct debit of balance due:
Enter the payment date to withdraw from the account above . . . ► ______
Balance-due amount from this return . . . ► ______

Amended Returns:
Do you want to elect **direct debit** of federal **amended** balance due (e-File only)? . . . ► [ ] Yes [ ] No
Enter the payment date to withdraw from the account above . . . ► ______
Balance-due amount from this **amended** return . . . ► ______

Part VI — Additional Information for Your Federal Return

Standard Deduction/Itemized Deductions:
Check this box if you are itemizing for state tax or other purposes even though your itemized deductions are less than your standard deduction . . . ► [ ]
Check this box if you are married filing separately and your spouse itemized deductions . . . ► [ ]
Check this box to take the standard deduction even if less than itemized deductions . . . ► [ ]

Real Estate Professionals:
Do you or your spouse qualify for the special passive activity rules for taxpayers in real property business? (see Help) . . . ► [ ] Yes [ ] No

Credit for Qualified Retirement Savings Contributions (Form 8880):
Is the taxpayer a full-time student? . . . ► [ ] Yes [ ] No
Is the spouse a full-time student? . . . ► [ ] Yes [ ] No

American Opportunity and Lifetime Learning Credit (Form 8863)
For 2022, were you (or your spouse if married) a nonresident alien for any part of the year, and did not elect to be treated as a resident alien? . . . ► [ ] Yes [ ] No

Foreign Tax Credit (Form 1116):
Check this box to file Form 1116 even if you're not required to file Form 1116 . . . ► [ ]
Resident country . . . ► USA

Excludable Income from Am. Samoa, Guam, Commonwealth of the N. Mariana Islands, or Puerto Rico:
Excludable income of bona fide residents of American Samoa, Guam, or the Commonwealth of the Northern Mariana Islands . . . ______
Excludable income from Puerto Rico . . . ______

Dual Status Alien Return:
Check this box if you are a dual-status alien . . . ► [ ]
Check this box to print 'DUAL-STATUS STATEMENT' on Form 1040 . . . ► [ ]

Third Party Designee:
Caution: Review transferred information for accuracy.
Do you want to allow another person to discuss this return with the IRS? . . . ► [ ] Yes [ ] No
If Yes, complete the following:
Third party designee name . . . ► ______
Third party designee phone number . . ► ______
Personal Identification number (enter any 5 numbers) . . ► ______

Disaster Tax Relief:
Check if you took a disaster distribution between 2018 and 2020 . . . [ ]

Part VI — Additional Information for Your Federal Return — Continued

Personal Representative for deceased taxpayers:
Name of personal representative required for E-filed returns when Form 1310 is not filed or it is not the surviving spouse . . . . ► ____

Part VII — State Filing Information

Identity Protection PIN:

If the IRS sent the taxpayer an Identity Protection PIN, enter it here . . . . ► ____

If the IRS sent the spouse an Identity Protection PIN, enter it here . . . . ► ____

Taxpayer:

Enter the taxpayer's state of residence as of December 31, 2022 . . . . ► CA

Check the appropriate box:

Taxpayer is a resident of the state above for the entire year . . . . ► X

Taxpayer is a resident of the state above for only part of year . . . . ► ☐

Date the taxpayer established residence in state above . . . . ► ____

In which state (or foreign country) did the taxpayer reside before this change? . . . . ► ____

Spouse:

Enter the spouse's state of residence as of December 31, 2022 . . . . ► CA

Check the appropriate box:

Spouse is a resident of the state above for the entire year . . . . ► X

Spouse is a resident of the state above for only part of year . . . . ► ☐

Date the spouse established residence in state above . . . . ► ____

In which state (or foreign country) did the spouse reside before this change? . . . . ► ____

Nonresident states:

Nonresident State(s)	Taxpayer/Spouse/Joint

Check this box if you are in a Registered Domestic Partnership or a civil union . . . . ► ☐

If you checked the box on the line above, also check the appropriate box below:

Check if this is your individual federal return you are filing with the IRS . . . . ► ☐

Check if this is the joint return created to file joint state tax return (see Help) . . . . ► ☐

Use the PIN that you signed last year's tax return with.

Taxpayer's Prior year PIN . . ____________

Spouse's Prior year PIN . . . ____________

These signature PINs are chosen by the taxpayer and spouse and used for e-filing your tax return

Taxpayer's PIN used to sign the return 50301

Spouse's PIN used to sign the return 20302

Taxpayer:

Drivers license or state ID number F3335456

Issued by what state CA

License or ID license . ► X ID . ► ☐ neither . ► ☐ decline . ► ☐

Spouse

Drivers license or state ID number F2520672

Issued by what state CA

License or ID license . ► X ID . ► ☐ neither . ► ☐ decline . ► ☐

Personal Information Worksheet For the Taxpayer

2022

► Keep for your records

QuickZoom to another copy of Personal Information Worksheet . . . . ►
QuickZoom to Federal Information Worksheet . . . . ►

Part I — Taxpayer's Personal Information

First name . . . LEELA SESHU REDDY Middle initial . ___ Last name . . CHEEDEPUDI
Suffix . . . . . ___

Social security no. . . 024-88-7197 Member of U.S. Armed Forces in 2022? . . [ ] Yes [X] No

Date of birth . . . . . . 12/11/1978 (mm/dd/yyyy) age as of 1-1-2023. 44

Occupation . . . .Software Engineer Daytime phone . . . .(408)657-3748 Ext ___

Marital status . . .Married

If widowed, check the appropriate box for the year your spouse died:
After 2022 ► [ ] 2022 . ► [ ] 2021 . ► [ ] 2020 . ► [ ] Before 2020 . ► [ ]

Are you retired on total and permanent disability? (for Schedule R, see Help). . . . . . ► [ ] Yes [ ] No
Check if this person is legally blind . . . . ► [ ] Yes [X] No
If deceased, enter the date of death . . . . ► (mm/dd/yyyy) ___

Were you under the age of 16 as of 1-1-2023 and this is the first year you are filing a tax return? . . . . ► [ ] Yes [ ] No

Language in which you want the IRS to communicate with you . . . . ► ___

Do you want $3 to go to Presidential Election Campaign Fund? . . . . ► [ ] Yes [ ] No

Part II — Questions for Individuals Who Could Be Or Are Dependents of Another Taxpayer

1 **Can** another taxpayer (such as your parent) claim you as a dependent?. . . . . . ► [ ] Yes [X] No

2 a If you answered 'Yes' to question 1, are you actually claimed as a dependent on that person's tax return? . . . . ► [ ] Yes [ ] No

b If you answered 'No' to question 2a, was the person(s) who could claim you required to file a tax return for 2022, or filed a tax return for any reason other than to claim a refund of taxes paid or withheld? If the answer is 'No', change the answer to question 1 to 'No'. *(see help)* . . . . ► [ ] Yes [ ] No

Questions 3 through 5 are only required for individuals who claim the American Opportunity Credit.

3 Were you a full-time student during any part of five months during 2022? . . . . . ► [ ] Yes [ ] No
4 Did your earned income exceed one-half of your support? . . . . ► [ ] Yes [ ] No
5 Was at least one of your parents alive on December 31, 2022?. . . . . ► [ ] Yes [ ] No

Part III — Taxpayer's State Residency Information

Enter this person's state of residence as of December 31, 2022 . . . . CA

Check the appropriate box:
This person is a resident of the state above for the entire year . . . . [X]
This person is a resident of the state above for only part of year . . . . [ ]
Date this person established residence in state above . . . . ► ___
In which state (or foreign country) did this person reside before this change? . . . . ► ___

Part IV — Dependent Care Expenses

Qualified dependent care expenses incurred and paid for this person in 2022 . . . . ___
Unreimbursed medical expenses paid for qualifying person in 2022 . . . . ___
Employment taxes paid for dependent care providers in 2022 . . . . ___
Full-time student for 5 calendar months during 2022?. ► [ ] Yes [ ] No

Disabled person who was not physically or mentally capable of self-care? . . . . ►	☐	Yes	☐	No
This person is a qualifying person for the child and dependent care credit . . . . ►	☐	Yes	X	No

Personal Information Worksheet For the Spouse

2022

► Keep for your records

QuickZoom to another copy of Personal Information Worksheet . . . . ►
QuickZoom to Federal Information Worksheet . . . . ►

Part I — Spouse's Personal Information

First name . . . VANI Middle initial . ___ Last name . . YENUMULA
Suffix . . . . . ___

Social security no. . . 382-35-7565 Member of U.S. Armed Forces in 2022? . . ☐ Yes ☒ No

Date of birth . . . . . . 10/22/1982 (mm/dd/yyyy) age as of 1-1-2023 40

Occupation . . . . Project Manager Daytime phone . . . . ________ Ext ____

Marital status . . . Married

If widowed, check the appropriate box for the year your spouse died:
After 2022 ► ☐ 2022 . ► ☐ 2021 . ► ☐ 2020 . ► ☐ Before 2020 . ► ☐

Are you retired on total and permanent disability? (for Schedule R, see Help). . . . . . ► ☐ Yes ☐ No
Check if this person is legally blind . . . . ► ☐ Yes ☒ No
If deceased, enter the date of death . . . . ► (mm/dd/yyyy) ________

Were you under the age of 16 as of 1-1-2023 and this is the first year you are filing a tax return? . . . . ► ☐ Yes ☐ No

Language in which you want the IRS to communicate with you . . . . ► ________

Do you want $3 to go to Presidential Election Campaign Fund? . . . . ► ☐ Yes ☐ No

Part II — Questions for Individuals Who Could Be Or Are Dependents of Another Taxpayer

1 **Can** another taxpayer (such as your parent) claim you as a dependent?. . . . . . ► ☐ Yes ☒ No

2 a If you answered 'Yes' to question 1, are you actually claimed as a dependent on that person's tax return? . . . . ► ☐ Yes ☐ No

b If you answered 'No' to question 2a, was the person(s) who could claim you required to file a tax return for 2022, or filed a tax return for any reason other than to claim a refund of taxes paid or withheld? If the answer is 'No', change the answer to question 1 to 'No'. *(see help)* . . . . ► ☐ Yes ☐ No

Questions 3 through 5 are only required for individuals who claim the American Opportunity Credit.

3 Were you a full-time student during any part of five months during 2022? . . . . . ► ☐ Yes ☐ No
4 Did your earned income exceed one-half of your support? . . . . ► ☐ Yes ☐ No
5 Was at least one of your parents alive on December 31, 2022?. . . . . ► ☐ Yes ☐ No

Part III — Spouse's State Residency Information

Enter this person's state of residence as of December 31, 2022 . . . . CA

Check the appropriate box:
This person is a resident of the state above for the entire year . . . . ☒
This person is a resident of the state above for only part of year . . . . ☐
Date this person established residence in state above . . . . ► ________
In which state (or foreign country) did this person reside before this change? . . . . ► ____

Part IV — Dependent Care Expenses

Qualified dependent care expenses incurred and paid for this person in 2022 . . . . ________
Unreimbursed medical expenses paid for qualifying person in 2022 . . . . ________
Employment taxes paid for dependent care providers in 2022 . . . . ________
Full-time student for 5 calendar months during 2022?. . . . . ► ☐ Yes ☐ No

Disabled person who was not physically or mentally capable of self-care? . . . . ►		Yes		No
This person is a qualifying person for the child and dependent care credit . . . . ►		Yes	X	No

Dependent and Nondependent Information Worksheet 2022

► Keep for your records

QuickZoom to another copy of Dependent and Nondependent Information Worksheet . . . . ►
QuickZoom to Federal Information Worksheet . . . . ►

Part I – Personal Information

First name . . . PRATEEK Middle initial . R Last name . . CHEEDEPUDI
Suffix . . . . . ______

Social security no. . . 380-35-5303

Date of birth . . . . . . 08/23/2008 (mm/dd/yyyy) age as of 12-31-2022 14
Did this person pass away in 2022 (deceased)? . . [ ] Yes [X] No Date of death . ______

Relationship to taxpayer or spouse . . . . Son
CAUTION: If claiming a child other than your own, see **Relationship** in the Tax Help.

NOTE: The ability to set your answers to being the same as last year for the dependent is only available in Step-by-Step mode and not in Forms mode.
Are the answers to the questions below for this person, to determine whether they are your dependent, the same as they were last year? . . . . ► [ ] Yes [X] No

Dependency code * . L – Your dependent child who lived with you

*Dependency code is set based on your selections in the Dependency Exemption/EIC Smart Worksheet

Dependent is disabled . . . . [ ]

Check this box if: [ ]
- The taxpayer filing this return is filing as Qualifying Surviving Spouse
- This dependency code for this dependent is type X
- This dependent would qualify as a qualifying child for the Qualifying Surviving Spouse filing status except the dependent's gross income was $4,400 or more, or was filing a married filing joint return, or the taxpayer could be claimed as a dependent

Part II – Earned Income Credit and Child Tax Credit

Is this person a U.S. citizen, U.S. national, or a U.S. resident? . . . . [X] Yes [ ] No
Is this person a resident of Canada or Mexico? . . . . [ ] Yes [X] No

This person is adopted and you are a U.S. citizen or U.S. national . . . . [ ]
TurboTax Web Only:
Was the adoption final as of December 31, 2022? . . . . [ ] Yes [ ] No
Was the person placed with you for adoption after 2022, or was the adoption final in 2022 or later? . . . . [ ] Yes [ ] No
The adopted child lived with you all year . . . . [ ] Yes [ ] No
*If the child is adopted, you are a U.S. citizen or U.S. national and they lived with you all year, they are considered to meet the citizen test and the U.S. citizen box will automatically be checked yes.

Child is a potentially qualifying child for earned income credit . . . . [X] Yes [ ] No
Child is a nondependent, but may qualify for earned income credit . . . . [ ] Yes [ ] No
You, and no one else, is claiming this nondependent for the earned income credit . . . . . . [ ] Yes [ ] No

Months lived with taxpayer in the United States 12

Qualifying for the earned income credit * . E – Qualifying child

*EIC code is set based on your selections in the Dependency Exemption/EIC Smart Worksheet

Check if Social Security number is **not** valid for employment . . . . [ ]

Check if this person is **not** a qualifying child for the child tax credit . . . . [ ]
Check if this person is **not** a qualifying person for the credit for other dependents . . . . [ ]

Dependent has ITIN . . ► [ ]

Dependent name . . . . PRATEEK R CHEEDEPUDI

Part III — Dependent Care Expenses

Qualified child or dependent care expenses incurred and paid in 2022 . . . .

Unreimbursed medical expenses paid for qualifying person in 2022 . . . .

Employment taxes paid for dependent care providers in 2022 . . . .

Child or dependent is a qualifying person for the child and dependent care credit . . . . [ ] Yes [X] No

Child is a nondependent, but may qualify for the child and dependent care credit . . . . [ ] Yes [ ] No

Part V — Dependent's State Residency Information

Enter this person's state of residence as of December 31, 2022 . . . .

Check the appropriate box:

This person is a resident of the state above for the entire year . . . . [ ]

This person is a resident of the state above for only part of year . . . . [ ]

Date this person established residence in state above . . . . ►

In which state (or foreign country) did this person reside before this change? . . . . ►

Part VI — Identity Protection Pin

If the IRS sent an Identity Protection PIN for this dependent, enter it here . . . .

Dependent and Nondependent Information Worksheet 2022

► Keep for your records

QuickZoom to another copy of Dependent and Nondependent Information Worksheet . . . . ►
QuickZoom to Federal Information Worksheet . . . . ►

Part I – Personal Information

First name . . . TARA   Middle initial . R   Last name . . CHEEDEPUDI
Suffix . . . . . ______

Social security no. . . 768-47-7952

Date of birth . . . . . . 02/26/2013 (mm/dd/yyyy)   age as of 12-31-2022 9
Did this person pass away in 2022 (deceased)? . . [ ] Yes [ ] No   Date of death . ______

Relationship to taxpayer or spouse . . . . Daughter
CAUTION: If claiming a child other than your own, see **Relationship** in the Tax Help.

NOTE: The ability to set your answers to being the same as last year for the dependent is only available in Step-by-Step mode and not in Forms mode.
Are the answers to the questions below for this person, to determine whether they are your dependent, the same as they were last year? . . . . ► [X] Yes [ ] No

Dependency code * . L – Your dependent child who lived with you

*Dependency code is set based on your selections in the Dependency Exemption/EIC Smart Worksheet

Dependent is disabled . . . . [X]

Check this box if: [ ]
- The taxpayer filing this return is filing as Qualifying Surviving Spouse
- This dependency code for this dependent is type X
- This dependent would qualify as a qualifying child for the Qualifying Surviving Spouse filing status except the dependent's gross income was $4,400 or more, or was filing a married filing joint return, or the taxpayer could be claimed as a dependent

Part II – Earned Income Credit and Child Tax Credit

Is this person a U.S. citizen, U.S. national, or a U.S. resident? . . . . [X] Yes [ ] No
Is this person a resident of Canada or Mexico? . . . . [ ] Yes [X] No

This person is adopted and you are a U.S. citizen or U.S. national . . . . [ ]
TurboTax Web Only:
Was the adoption final as of December 31, 2022? . . . . [ ] Yes [ ] No
Was the person placed with you for adoption after 2022, or was the adoption final in 2022 or later? . . . . [ ] Yes [ ] No
The adopted child lived with you all year . . . . [ ] Yes [ ] No
*If the child is adopted, you are a U.S. citizen or U.S. national and they lived with you all year, they are considered to meet the citizen test and the U.S. citizen box will automatically be checked yes.

Child is a potentially qualifying child for earned income credit . . . . [X] Yes [ ] No
Child is a nondependent, but may qualify for earned income credit . . . . [ ] Yes [ ] No
You, and no one else, is claiming this nondependent for the earned income credit . . . . . . [ ] Yes [ ] No

Months lived with taxpayer in the United States 12

Qualifying for the earned income credit * . E – Qualifying child

*EIC code is set based on your selections in the Dependency Exemption/EIC Smart Worksheet

Check if Social Security number is **not** valid for employment . . . . [ ]

Check if this person is **not** a qualifying child for the child tax credit . . . . [ ]
Check if this person is **not** a qualifying person for the credit for other dependents . . . . [ ]

Dependent has ITIN . . ► [ ]

Dependent name . . . . TARA R CHEEDEPUDI

Part III ─ Dependent Care Expenses

Qualified child or dependent care expenses incurred and paid in 2022 . . . . ______

Unreimbursed medical expenses paid for qualifying person in 2022 . . . . ______

Employment taxes paid for dependent care providers in 2022 . . . . ______

Child or dependent is a qualifying person for the child and dependent care credit . . . . [X] Yes [ ] No

Child is a nondependent, but may qualify for the child and dependent care credit . . . . [ ] Yes [ ] No

Part V ─ Dependent's State Residency Information

Enter this person's state of residence as of December 31, 2022 . . . . ____

Check the appropriate box:

This person is a resident of the state above for the entire year . . . . [ ]

This person is a resident of the state above for only part of year . . . . [ ]

Date this person established residence in state above . . . . ► ______

In which state (or foreign country) did this person reside before this change? . . . . ► ____

Part VI ─ Identity Protection Pin

If the IRS sent an Identity Protection PIN for this dependent, enter it here . . . . ______

Form 1040 | **Forms W-2 & W-2G Summary** | **2022**

► Keep for your records

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security Number: 024-88-7197

Form W-2 Summary

Box No.	Description	Taxpayer	Spouse	Total
1	Total wages, tips and compensation:			
a	W2 box 1 statutory wages reported on Sch C			
b	W2 box 1 inmate or halfway house wages			
c	All other W2 box 1 wages	170,318.	98,536.	268,854.
d	Foreign wages included in total wages			
e	Unreported tips	0.	0.	0.
2	Total federal tax withheld	31,366.	9,749.	41,115.
3 & 7	Total social security wages/tips	147,000.	98,536.	245,536.
4	Total social security tax withheld	9,114.	6,110.	15,224.
5	Total Medicare wages and tips	185,291.	98,536.	283,827.
6	Total Medicare tax withheld	2,687.	1,429.	4,116.
8	Total allocated tips			
9	Not used			
10 a	Total dependent care benefits			
b	Offsite dependent care benefits			
c	Onsite dependent care benefits			
11	Total distributions from nonqualified plans			
12 a	Total from Box 12	50,638.	53.	50,691.
b	Elective deferrals to qualified plans	14,973.		14,973.
c	Roth contrib. to 401(k), 403(b), 457(b) plans	5,527.		5,527.
d 1	Elective deferrals to government 457 plans			
2	Non-elective deferrals to gov't 457 plans			
e	Deferrals to non-government 457 plans			
f	Deferrals 409A nonqual deferred comp plan			
g	Income 409A nonqual deferred comp plan			
h	Uncollected Medicare tax			
i	Uncollected social security and RRTA tier 1			
j	Uncollected RRTA tier 2			
k	Income from nonstatutory stock options			
l	Non-taxable combat pay			
m	QSEHRA benefits			
n	Total other items from box 12	30,138.	53.	30,191.
14 a	Total deductible mandatory state tax	1,602.	1,084.	2,686.
b	Total deductible charitable contributions	101.		101.
c	This line does not apply to TurboTax			
d	Total RR Compensation			
e	Total RR Tier 1 tax			
f	Total RR Tier 2 tax			
g	Total RR Medicare tax			
h	Total RR Additional Medicare tax			
i	Total RRTA tips			
j	Total other items from box 14			
k	Total sick leave subject to $511 limit			
l	Total sick leave subject to $200 limit			
m	Total emergency family leave wages			
16	Total state wages and tips	170,318.	98,536.	268,854.
17	Total state tax withheld	13,382.	5,889.	19,271.
19	Total local tax withheld			

Form **W-2** | **Wage and Tax Statement** ► Keep for your records | **2022**

Name: VANI YENUMULA
Social Security Number: 382-35-7565

[X] **Spouse's W-2**
[ ] **Do not transfer this W-2 to next year**

Military: Complete **Part VI** on Page 2 below.

a Employee's social security no. . . 382-35-7565
b Employer ID number (EIN). . . . 20-4078036
c Employer's name, address, and ZIP code
Premier healthcare services llc

Street 400 interstate N pkwy su
City atlanta
State GA ZIP Code 30339

Foreign Province
Foreign Postal Code
Foreign Country

d Control number . 134284 NCN2/HXG

[X] **Transfer employee information from the Federal Information Worksheet**

e Employee's name
First VANI M.I.
Last YENUMULA Suff.
f Employee's address and ZIP code
Street 1928 Everglades Dr
City Milpitas
State CA ZIP Code 95035-6612
Foreign Province
Foreign Postal Code
Foreign Country

1 Wages, tips, other compensation: 4,701.60
2 Federal income tax withheld: 334.99
3 Social security wages: 4,701.60
4 Social security tax withheld: 291.50
5 Medicare wages and tips: 4,701.60
6 Medicare tax withheld: 68.17
7 Social security tips
8 Allocated tips

► *Enter unreported tips in Part VII on Page 2 below.*

9
10 Dependent care benefits
11 Nonqualified plans
Distributions from sect. 457 and nonqualified plans *(Important, see Help)*
12 Enter box 12 below

13 [ ] Statutory employee
[ ] Retirement plan
[ ] Third-party sick pay

14 Enter box 14 below **after** entering boxes 18, 19, and 20.
NOTE: Enter box 15 **before** entering box 14.

Box 12 Code	**Box 12** Amount

If Box 12 code is:
A: Enter amount attributable to RRTA Tier 2 tax .
M: Enter amount attributable to RRTA Tier 2 tax .
P: Double-click to link to Form 3903, line 4 . . .
R: Enter MSA contribution for Taxpayer . . . .
Spouse . . . . .
W: Enter HSA contribution for Taxpayer . . . .
Spouse . . . . .
G: Is employer a state or local government? Yes [ ] No [ ]
Is this an elective deferral? Yes [ ] No [ ]

Box 15 State	**Box 15** Employer's state I.D. number	**Box 16** State wages, tips, etc.	**Box 17** State income tax
CA	26330761	4,701.60	77.98

I confirm that the state withholding identification number(s) are accurate . . . . [ ]

Box 20 Locality name	**Box 18** Local wages, tips, etc.	**Box 19** Local income tax	Associated State

Box 14 Description or Code on Actual Form W-2	Amount	TurboTax Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select "Other".)
CA SDI	51.72	California SDI tax

Form **W-2** | **Wage and Tax Statement** | **2022**

► Keep for your records

Name: LEELA SESHU REDDY CHEEDEPUDI
Social Security Number: 024-88-7197

☐ **Spouse's W-2**
☐ **Do not transfer this W-2 to next year**

Military: Complete **Part VI** on Page 2 below.

a Employee's social security no. . . 024-88-7197
b Employer ID number (EIN). . . . 82-3158290
c Employer's name, address, and ZIP code
Landing AI US Corp

Street 195 Page Mill Rd
City Palo Alto
State CA ZIP Code 94306

Foreign Province
Foreign Postal Code
Foreign Country

d Control number .

☐ **Transfer employee information from the Federal Information Worksheet**

e Employee's name
First Leela Seshu Reddy M.I.
Last Cheedepudi Suff.
f Employee's address and ZIP code
Street 1928 Everglades Dr
City Milpitas
State CA ZIP Code 95035
Foreign Province
Foreign Postal Code
Foreign Country

1	Wages, tips, other compensation: 170,318.03	**2**	Federal income tax withheld: 31,366.29
3	Social security wages: 147,000.00	**4**	Social security tax withheld: 9,114.00
5	Medicare wages and tips: 185,291.31	**6**	Medicare tax withheld: 2,686.72
7	Social security tips	**8**	Allocated tips
	Enter unreported tips in Part VII on Page 2 below.		
9		**10**	Dependent care benefits
11	Nonqualified plans		Distributions from sect. 457 and nonqualified plans *(Important, see Help)*
12	Enter box 12 below		

13 ☐ Statutory employee
☒ Retirement plan
☐ Third-party sick pay

14 Enter box 14 below **after** entering boxes 18, 19, and 20.
NOTE: Enter box 15 **before** entering box 14.

Box 12 Code	**Box 12** Amount
D	14,973.28
AA	5,526.72
DD	30,138.14

If Box 12 code is:
- A: Enter amount attributable to RRTA Tier 2 tax .
- M: Enter amount attributable to RRTA Tier 2 tax .
- P: Double-click to link to Form 3903, line 4 . . .
- R: Enter MSA contribution for Taxpayer . . . . / Spouse . . . . .
- W: Enter HSA contribution for Taxpayer . . . . / Spouse . . . . .
- G: Is employer a state or local government? Yes ☐ No ☐
  Is this an elective deferral? Yes ☐ No ☐

Box 15 State	**Box 15** Employer's state I.D. number	**Box 16** State wages, tips, etc.	**Box 17** State income tax
CA	087-3537-5	170,318.03	13,381.52

I confirm that the state withholding identification number(s) are accurate . . . . ☐

Box 20 Locality name	**Box 18** Local wages, tips, etc.	**Box 19** Local income tax	Associated State

Box 14 Description or Code on Actual Form W-2	Amount	TurboTax Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select "Other".)
CA SDI	1,601.60	California SDI tax
CHARITY	101.00	Charitable cash contribution

Form **W-2** | **Wage and Tax Statement** ► Keep for your records | **2022**

Name: VANI YENUMULA
Social Security Number: 382-35-7565

[X] **Spouse's W-2**
[ ] **Do not transfer this W-2 to next year**

Military: Complete **Part VI** on Page 2 below.

a Employee's social security no. . . 382-35-7565
b Employer ID number (EIN). . . 81-4996118
c Employer's name, address, and ZIP code
Accenture Flex LLC
SUITE 100
Street 500 W. Madison Street
City Chicago
State IL ZIP Code 60661

Foreign Province
Foreign Postal Code
Foreign Country

d Control number .

[ ] **Transfer employee information from the Federal Information Worksheet**

e Employee's name
First Vani M.I.
Last Yenumula Suff.
f Employee's address and ZIP code
Street 1928 Everglades Drive
City Milpitas
State CA ZIP Code 95035
Foreign Province
Foreign Postal Code
Foreign Country

1 Wages, tips, other compensation: 93,834.47
2 Federal income tax withheld: 9,414.35
3 Social security wages: 93,834.47
4 Social security tax withheld: 5,817.74
5 Medicare wages and tips: 93,834.47
6 Medicare tax withheld: 1,360.60
7 Social security tips
8 Allocated tips

► *Enter unreported tips in Part VII on Page 2 below.*

9
10 Dependent care benefits
11 Nonqualified plans
Distributions from sect. 457 and nonqualified plans *(Important, see Help)*
12 Enter box 12 below

13 [ ] Statutory employee [ ] Retirement plan [ ] Third-party sick pay

14 Enter box 14 below **after** entering boxes 18, 19, and 20.
NOTE: Enter box 15 **before** entering box 14.

Box 12 Code	**Box 12** Amount
C	52.80

If Box 12 code is:
A: Enter amount attributable to RRTA Tier 2 tax .
M: Enter amount attributable to RRTA Tier 2 tax .
P: Double-click to link to Form 3903, line 4 . . .
R: Enter MSA contribution for Taxpayer . . . .
Spouse . . . . .
W: Enter HSA contribution for Taxpayer . . . .
Spouse . . . . .
G: Is employer a state or local government? Yes [ ] No [ ]
Is this an elective deferral? Yes [ ] No [ ]

Box 15 State	**Box 15** Employer's state I.D. number	**Box 16** State wages, tips, etc.	**Box 17** State income tax
CA	084-3002-7	93,834.47	5,810.51

I confirm that the state withholding identification number(s) are accurate . . . . [ ]

Box 20 Locality name	**Box 18** Local wages, tips, etc.	**Box 19** Local income tax	Associated State

Box 14 Description or Code on Actual Form W-2	Amount	TurboTax Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select "Other".)
CA SDI	1,031.60	California SDI tax

Form 1099-INT Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
VANI YENUMULA	382-35-7565

Ownership: (defaults to taxpayer)

Check if Taxpayer	
Check if Spouse	X
Check if Joint	

Payer's name . . . . wells fargo bank

Box 1	Interest income for 2022 (not included in box 3) _____ Choose type if special state handling (State Use Only — see Help).	36.98
Box 2	Early withdrawal penalty	
Box 3	Interest on U.S. Savings Bonds and Treasury obligations	
Box 4	**Federal income tax withheld**	
Box 5	Investment expenses	
Box 6	Foreign tax paid. (All interest is considered passive. See Help) **a** Check to deduct foreign taxes on Schedule A . . . ☐ **OR** **b DoubleClick** to link to a copy of Form 1116 . . . ☐ **c** For Form 1116, select which column . . . . **A** ☐ **B** ☐ **C** ☐ **d** Foreign source amount included in interest	
Box 7	Foreign country or U.S. possession . . . . . *(Imported name: ________)* Check this box if foreign tax is from a mutual fund or a registered investment company. See Tax Help for additional information	☐
Box 8	Tax-exempt interest — Total	

Tax-exempt Interest State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest for state	(c) Amount of interest for state
Enter resident state ID ►			
Enter each nonresident state on separate row ► or Enter XX for all nonresident states (that aren't filed) i.e., you own a fund with no resident state interest.			
Total ►			

State ID where exempt interest was earned. If more than 1 state, see Help . . . . .

Box 9	Specified private activity bond included in Box 8 subject to AMT, if any **OR** Private activity bond interest percentage of Box 8, if any	%
Box 10	Market discount (See tax help for manual entries required if you enter amount for market discount)	
Box 11	Bond premium	
Box 12	Bond premium on treasury obligations	
Box 13	Bond premium on tax-exempt bond	
Box 14	Tax-exempt and tax credit bond CUSIP number (if various, leave blank)	

Box 15 State	**Box 16** State identification no.	**Box 17** State tax withheld

I confirm that the state withholding identification number(s) are accurate . . . . . . ☐

FATCA filing requirement . . . . . . ☐

Adjustments to Interest

Check the box that identifies the type of adjustment being made:

N ☐	Nominee distribution	**A** ☐	Accrued interest
O ☐	Original issue discount (OID)	**H** ☐	Other
B ☐	Amortizable bond premium (ABP)	**R** ☐	Bond premium on treasury obligations
T ☐	Bond premium on tax-exempt	**U** ☐	U.S. savings bond interest previously reported

Enter adjustment amount (enter as positive if subtracting / negative if adding) . . . .

Additional Payer and Recipient Information

Payer's TIN . . . .

Payer's address and ZIP code
Street .
City . . .
State . . ZIP Code
Foreign Country . .

Recipient's address and ZIP code
Transfer address from Federal Information Wks . . ☐
Street .
City . .
State . ZIP Code
Foreign Country . .

Form 1099-INT Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
Check if Taxpayer X
Check if Spouse . . . .
Check if Joint . . . .

Payer's name . . . . NATIONAL FINANCIAL SERVICES LLC

Box 1	Interest income for 2022 (not included in box 3) . . . . Choose type if special state handling (State Use Only — see Help).	0.43
Box 2	Early withdrawal penalty	
Box 3	Interest on U.S. Savings Bonds and Treasury obligations	
Box 4	**Federal income tax withheld**	
Box 5	Investment expenses	
Box 6	Foreign tax paid. (All interest is considered passive. See Help) . . . . a Check to deduct foreign taxes on Schedule A . . . **OR** b **DoubleClick** to link to a copy of Form 1116 . . . . c For Form 1116, select which column . . . . **A** **B** **C** d Foreign source amount included in interest	
Box 7	Foreign country or U.S. possession . . . . . *(Imported name:)* Check this box if foreign tax is from a mutual fund or a registered investment company. See Tax Help for additional information	
Box 8	Tax-exempt interest — Total	

Tax-exempt Interest State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest for state	(c) Amount of interest for state
Enter resident state ID . . . . ►			
Enter each nonresident state on separate row . . . ► or Enter XX for all nonresident states (that aren't filed) i.e., you own a fund with no resident state interest.			
Total . . . . ►			

State ID where exempt interest was earned. If more than 1 state, see Help . . . . .

Box 9	Specified private activity bond included in Box 8 subject to AMT, if any **OR** . . . . . Private activity bond interest percentage of Box 8, if any	%
Box 10	Market discount (See tax help for manual entries required if you enter amount for market discount)	
Box 11	Bond premium	
Box 12	Bond premium on treasury obligations	
Box 13	Bond premium on tax-exempt bond	
Box 14	Tax-exempt and tax credit bond CUSIP number (if various, leave blank)	

Box 15 State	**Box 16** State identification no.	**Box 17** State tax withheld

I confirm that the state withholding identification number(s) are accurate . . . . . .

FATCA filing requirement . . . .

Adjustments to Interest

Check the box that identifies the type of adjustment being made:

- **N** Nominee distribution
- **O** Original issue discount (OID)
- **B** Amortizable bond premium (ABP)
- **T** Bond premium on tax-exempt
- **A** Accrued interest
- **H** Other
- **R** Bond premium on treasury obligations
- **U** U.S. savings bond interest previously reported

Enter adjustment amount (enter as positive if subtracting / negative if adding) . . . .

Additional Payer and Recipient Information

Payer's TIN 04-3523567

Payer's address and ZIP code
Street . 499 WASHINGTON BLVD
City. . . JERSEY CITY
State . . NJ ZIP Code 07310
Foreign Country. .

Recipient's address and ZIP code
Transfer address from Federal Information Wks . .
Street .
City . .
State . ZIP Code
Foreign Country . .

Form 1099-INT Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
- Check if Taxpayer: X
- Check if Spouse:
- Check if Joint:

Payer's name . . . . loanDepot

Box 1	Interest income for 2022 (not included in box 3) . . . . ______ Choose type if special state handling (State Use Only — see Help).	17.33
Box 2	Early withdrawal penalty	
Box 3	Interest on U.S. Savings Bonds and Treasury obligations	
Box 4	**Federal income tax withheld**	
Box 5	Investment expenses	
Box 6	Foreign tax paid. (All interest is considered passive. See Help) **a** Check to deduct foreign taxes on Schedule A . . . ☐ **OR** **b** **DoubleClick** to link to a copy of Form 1116 . . . . **c** For Form 1116, select which column . . . . **A** ☐ **B** ☐ **C** ☐ **d** Foreign source amount included in interest	
Box 7	Foreign country or U.S. possession . . . . . *(Imported name:)* Check this box if foreign tax is from a mutual fund or a registered investment company. See Tax Help for additional information . . . ☐	
Box 8	Tax-exempt interest — Total	

Tax-exempt Interest State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest for state	(c) Amount of interest for state
Enter resident state ID . . . . ►			
Enter each nonresident state on separate row . . . ► or Enter XX for all nonresident states (that aren't filed) i.e., you own a fund with no resident state interest.			
Total . . . . ►			

State ID where exempt interest was earned. If more than 1 state, see Help . . . . .

Box 9	Specified private activity bond included in Box 8 subject to AMT, if any **OR** Private activity bond interest percentage of Box 8, if any	%
Box 10	Market discount (See tax help for manual entries required if you enter amount for market discount)	
Box 11	Bond premium	
Box 12	Bond premium on treasury obligations	
Box 13	Bond premium on tax-exempt bond	
Box 14	Tax-exempt and tax credit bond CUSIP number (if various, leave blank)	

Box 15 State	**Box 16** State identification no.	**Box 17** State tax withheld

I confirm that the state withholding identification number(s) are accurate . . . . . . ☐

FATCA filing requirement . . . . ☐

Adjustments to Interest

Check the box that identifies the type of adjustment being made:

N ☐	Nominee distribution	**A** ☐	Accrued interest
O ☐	Original issue discount (OID)	**H** ☐	Other
B ☐	Amortizable bond premium (ABP)	**R** ☐	Bond premium on treasury obligations
T ☐	Bond premium on tax-exempt	**U** ☐	U.S. savings bond interest previously reported

Enter adjustment amount (enter as positive if subtracting / negative if adding) . . . .

Additional Payer and Recipient Information

Payer's TIN	**Recipient's address and ZIP code**
Payer's address and ZIP code	Transfer address from Federal Information Wks . . ☐
Street .	Street .
City . . .	City . .
State . . ZIP Code	State . ZIP Code
Foreign Country . .	Foreign Country . .

Form 1099-INT Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
Check if Taxpayer X
Check if Spouse . . . .
Check if Joint . . . .

Payer's name . . . . BANK OF AMERICA, N.A.

Box 1	Interest income for 2022 (not included in box 3) . . . . ____ Choose type if special state handling (State Use Only — see Help).	24.10
Box 2	Early withdrawal penalty	
Box 3	Interest on U.S. Savings Bonds and Treasury obligations	
Box 4	**Federal income tax withheld**	
Box 5	Investment expenses	
Box 6	Foreign tax paid. (All interest is considered passive. See Help) . . . . **a** Check to deduct foreign taxes on Schedule A . . . ☐ **OR** **b** **DoubleClick** to link to a copy of Form 1116 . . . . **c** For Form 1116, select which column . . . . **A** ☐ **B** ☐ **C** ☐ **d** Foreign source amount included in interest	
Box 7	Foreign country or U.S. possession . . . . . *(Imported name:)* Check this box if foreign tax is from a mutual fund or a registered investment company. See Tax Help for additional information . . . . ☐	
Box 8	Tax-exempt interest — Total	

Tax-exempt Interest State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest for state	(c) Amount of interest for state
Enter resident state ID . . . . ►			
Enter each nonresident state on separate row . . . ► or Enter XX for all nonresident states (that aren't filed) i.e., you own a fund with no resident state interest.			
Total . . . . ►			

State ID where exempt interest was earned. If more than 1 state, see Help . . . . .

Box 9	Specified private activity bond included in Box 8 subject to AMT, if any **OR** . . . . . Private activity bond interest percentage of Box 8, if any	%
Box 10	Market discount (See tax help for manual entries required if you enter amount for market discount)	
Box 11	Bond premium	
Box 12	Bond premium on treasury obligations	
Box 13	Bond premium on tax-exempt bond	
Box 14	Tax-exempt and tax credit bond CUSIP number (if various, leave blank)	

Box 15 State	**Box 16** State identification no.	**Box 17** State tax withheld

I confirm that the state withholding identification number(s) are accurate . . . . . . ☐

FATCA filing requirement . . . . ☐

Adjustments to Interest

Check the box that identifies the type of adjustment being made:

N ☐	Nominee distribution	**A** ☐	Accrued interest
O ☐	Original issue discount (OID)	**H** ☐	Other
B ☐	Amortizable bond premium (ABP)	**R** ☐	Bond premium on treasury obligations
T ☐	Bond premium on tax-exempt	**U** ☐	U.S. savings bond interest previously reported

Enter adjustment amount (enter as positive if subtracting / negative if adding) . . . .

Additional Payer and Recipient Information

Payer's TIN 94-1687665

Payer's address and ZIP code
Street . PO BOX 15293
City. . . WILMINGTON
State . . DE ZIP Code 19850-5293
Foreign Country. .

Recipient's address and ZIP code
Transfer address from Federal Information Wks . . ☐
Street . 1928 EVERGLADES DR
City . . MILPITAS
State . CA ZIP Code 95035-6612
Foreign Country . .

Form 1099-INT Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
Check if Taxpayer X
Check if Spouse . . . .
Check if Joint . . . .

Payer's name . . . . loandepot com llc

Box 1	Interest income for 2022 (not included in box 3) . . . . ____ Choose type if special state handling (State Use Only — see Help).	103.42
Box 2	Early withdrawal penalty	
Box 3	Interest on U.S. Savings Bonds and Treasury obligations	
Box 4	**Federal income tax withheld**	
Box 5	Investment expenses	
Box 6	Foreign tax paid. (All interest is considered passive. See Help) . . . . **a** Check to deduct foreign taxes on Schedule A . . . ☐ **OR** **b** **DoubleClick** to link to a copy of Form 1116 . . . . **c** For Form 1116, select which column . . . . **A** ☐ **B** ☐ **C** ☐ **d** Foreign source amount included in interest	
Box 7	Foreign country or U.S. possession . . . . . *(Imported name:)* Check this box if foreign tax is from a mutual fund or a registered investment company. See Tax Help for additional information . . . . ☐	
Box 8	Tax-exempt interest — Total	

Tax-exempt Interest State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest for state	(c) Amount of interest for state
Enter resident state ID . . . . ►			
Enter each nonresident state on separate row . . . ► or Enter XX for all nonresident states (that aren't filed) i.e., you own a fund with no resident state interest.			
Total . . . . ►			

State ID where exempt interest was earned. If more than 1 state, see Help . . . . .

Box 9	Specified private activity bond included in Box 8 subject to AMT, if any **OR** . . . . . Private activity bond interest percentage of Box 8, if any	%
Box 10	Market discount (See tax help for manual entries required if you enter amount for market discount)	
Box 11	Bond premium	
Box 12	Bond premium on treasury obligations	
Box 13	Bond premium on tax-exempt bond	
Box 14	Tax-exempt and tax credit bond CUSIP number (if various, leave blank)	

Box 15 State	**Box 16** State identification no.	**Box 17** State tax withheld

I confirm that the state withholding identification number(s) are accurate . . . . . . ☐

FATCA filing requirement . . . . ☐

Adjustments to Interest

Check the box that identifies the type of adjustment being made:

N ☐	Nominee distribution	**A** ☐	Accrued interest
O ☐	Original issue discount (OID)	**H** ☐	Other
B ☐	Amortizable bond premium (ABP)	**R** ☐	Bond premium on treasury obligations
T ☐	Bond premium on tax-exempt	**U** ☐	U.S. savings bond interest previously reported

Enter adjustment amount (enter as positive if subtracting / negative if adding) . . . .

Additional Payer and Recipient Information

Payer's TIN . . . .
Payer's address and ZIP code
Street .
City . . .
State . . ZIP Code
Foreign Country . .

Recipient's address and ZIP code
Transfer address from Federal Information Wks . . ☐
Street .
City . .
State . ZIP Code
Foreign Country . .

Form 1099-INT Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
Check if Taxpayer X
Check if Spouse . . . .
Check if Joint . . . .

Payer's name . . . . CHARLES SCHWAB & CO., INC.

Box 1	Interest income for 2022 (not included in box 3) . . . . ____ Choose type if special state handling (State Use Only — see Help).	85.28
Box 2	Early withdrawal penalty	
Box 3	Interest on U.S. Savings Bonds and Treasury obligations	
Box 4	**Federal income tax withheld**	
Box 5	Investment expenses	
Box 6	Foreign tax paid. (All interest is considered passive. See Help) . . . . **a** Check to deduct foreign taxes on Schedule A . . . **OR** **b** **DoubleClick** to link to a copy of Form 1116 . . . . **c** For Form 1116, select which column . . . . **A** **B** **C** **d** Foreign source amount included in interest	
Box 7	Foreign country or U.S. possession . . . . . *(Imported name:)* Check this box if foreign tax is from a mutual fund or a registered investment company. See Tax Help for additional information	
Box 8	Tax-exempt interest — Total	

Tax-exempt Interest State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest for state	(c) Amount of interest for state
Enter resident state ID . . . . ►			
Enter each nonresident state on separate row . . . ► or Enter XX for all nonresident states (that aren't filed) i.e., you own a fund with no resident state interest.			
Total . . . . ►			

State ID where exempt interest was earned. If more than 1 state, see Help . . . . .

Box 9	Specified private activity bond included in Box 8 subject to AMT, if any **OR** . . . . . Private activity bond interest percentage of Box 8, if any	%
Box 10	Market discount (See tax help for manual entries required if you enter amount for market discount)	
Box 11	Bond premium	
Box 12	Bond premium on treasury obligations	0.00
Box 13	Bond premium on tax-exempt bond	
Box 14	Tax-exempt and tax credit bond CUSIP number (if various, leave blank)	

Box 15 State	**Box 16** State identification no.	**Box 17** State tax withheld

I confirm that the state withholding identification number(s) are accurate . . . . . .

FATCA filing requirement . . . .

Adjustments to Interest

Check the box that identifies the type of adjustment being made:

N	Nominee distribution	**A**	Accrued interest
O	Original issue discount (OID)	**H**	Other
B	Amortizable bond premium (ABP)	**R**	Bond premium on treasury obligations
T	Bond premium on tax-exempt	**U**	U.S. savings bond interest previously reported

Enter adjustment amount (enter as positive if subtracting / negative if adding) . . . .

Additional Payer and Recipient Information

Payer's TIN 94-1737782	**Recipient's address and ZIP code**
Payer's address and ZIP code	Transfer address from Federal Information Wks . .
Street . 211 MAIN ST.	Street .
City . . . SAN FRANCISCO	City . .
State . . CA ZIP Code 94105	State . ZIP Code
Foreign Country . .	Foreign Country . .

Form 1099-DIV Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
- Check if Taxpayer: X
- Check if Spouse:
- Check if Joint:

Payer's name . . . . Betterment Securities

Box 1a	Total ordinary dividends	229.42
	U.S. government interest, if any, included in box 1a	
Box 1b	Qualified dividends	151.43
	Adjusted qualified dividends	
Box 2a	Total capital gain distributions	0.00
Box 2b	Unrecaptured Section 1250 gain	0.00
Box 2c	Section 1202 gain eligible for 50% exclusion on QSB stock (See tax help)	
	Section 1202 gain eligible for 60% exclusion	
	Section 1202 gain eligible for 75% exclusion	
	Section 1202 gain eligible for 100% exclusion	
Box 2d	Collectibles (28%) gain	0.00
Box 2e	Section 897 ordinary dividends	
Box 2f	Section 897 capital gain	
Box 3	Nondividend distributions	0.00
Box 4	**Federal income tax withheld**	0.00
Box 5	Section 199A dividends	3.55
	Adjusted 199A dividends	
Box 6	Investment expenses	0.00
Box 7	Foreign tax paid (All income is considered passive. See Help)	8.18
	a Check to deduct foreign taxes on Schedule A . . . . ☐ **OR**	
	b **DoubleClick** to link to a copy of Form 1116	
	c For Form 1116, select which column . . . . . **A** ☐ **B** ☐ **C** ☐	
	d Total foreign source income	
Box 8	Foreign country or U.S. possession . . . . . *(Imported name:* Various *)*	Various
	Check this box if foreign tax is from a mutual fund or a regulated investment company. See Tax Help for additional information.	☐
Box 9	Cash liquidation distributions	0.00
Box 10	Noncash (fair market value) liquidation distributions	0.00
Box 11	FATCA filing requirement	☐
Box 12	Exempt-interest dividends	

Tax-exempt Interest Dividends State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest dividends for state	(c) Amount of interest dividends for state
Enter resident state ID ►			
Enter each nonresident state on a separate row ► or Enter XX for all nonresident states (that aren't filed) i.e. you own a fund with no resident state dividends.			
Total ►			

State where the dividends were earned. Postal code (such as "CA" or "NY")

Box 13
- **a** Specified private activity bond amount included in box 12 above
- **OR**
- **b** Percent of private activity bond amount included in . . . %

Box 14 State	**Box 15** State identification no.	**Box 16** State tax withheld

I confirm that the state withholding identification number(s) are accurate ☐

Adjustments to Dividends or ESOP Distribution

Check the box that identifies the type of adjustment being made or if ESOP distribution:
- **N** ☐ Nominee distribution
- **H** ☐ Other adjustment
- **D** ☐ ESOP distribution

Enter nominee or other adjustment amount (enter as positive)

Additional Payer and Recipient Information

Payer's TIN 74-3132639

Payer's address and ZIP code
Street 8 West 24th Street
City New York
State NY ZIP Code 10010
Foreign Country

Recipient's address and ZIP code
Transfer address from Federal Information Wks ☐
Street
City
State ZIP Code
Foreign Country

Form 1099-DIV Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
Check if Taxpayer: X
Check if Spouse:
Check if Joint:

Payer's name CHARLES SCHWAB & CO., INC.

Box 1a	Total ordinary dividends	2,771.81
	U.S. government interest, if any, included in box 1a	
Box 1b	Qualified dividends	2,218.55
	Adjusted qualified dividends	
Box 2a	Total capital gain distributions	0.73
Box 2b	Unrecaptured Section 1250 gain	
Box 2c	Section 1202 gain eligible for 50% exclusion on QSB stock (See tax help)	
	Section 1202 gain eligible for 60% exclusion	
	Section 1202 gain eligible for 75% exclusion	
	Section 1202 gain eligible for 100% exclusion	
Box 2d	Collectibles (28%) gain	
Box 2e	Section 897 ordinary dividends	
Box 2f	Section 897 capital gain	
Box 3	Nondividend distributions	
Box 4	**Federal income tax withheld**	
Box 5	Section 199A dividends	103.77
	Adjusted 199A dividends	
Box 6	Investment expenses	
Box 7	Foreign tax paid (All income is considered passive. See Help)	163.69
	a Check to deduct foreign taxes on Schedule A **OR**	
	b **DoubleClick** to link to a copy of Form 1116	
	c For Form 1116, select which column **A** **B** **C**	
	d Total foreign source income	
Box 8	Foreign country or U.S. possession *(Imported name:)*	
	Check this box if foreign tax is from a mutual fund or a regulated investment company. See Tax Help for additional information.	
Box 9	Cash liquidation distributions	
Box 10	Noncash (fair market value) liquidation distributions	
Box 11	FATCA filing requirement	
Box 12	Exempt-interest dividends	92.75

Tax-exempt Interest Dividends State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest dividends for state	(c) Amount of interest dividends for state
Enter resident state ID ►			
Enter each nonresident state on a separate row ► or Enter XX for all nonresident states (that aren't filed) i.e. you own a fund with no resident state dividends.			
Total ►			

State where the dividends were earned. Postal code (such as "CA" or "NY") CA

Box 13	**a** Specified private activity bond amount included in box 12 above	0.00
	OR	
	b Percent of private activity bond amount included in	%

Box 14 State	**Box 15** State identification no.	**Box 16** State tax withheld

I confirm that the state withholding identification number(s) are accurate

Adjustments to Dividends or ESOP Distribution

Check the box that identifies the type of adjustment being made or if ESOP distribution:
- **N** Nominee distribution
- **H** Other adjustment
- **D** ESOP distribution

Enter nominee or other adjustment amount (enter as positive)

Additional Payer and Recipient Information

Payer's TIN 94-1737782

Payer's address and ZIP code
Street 211 MAIN ST.
City SAN FRANCISCO
State CA ZIP Code 94105
Foreign Country

Recipient's address and ZIP code
Transfer address from Federal Information Wks
Street
City
State ZIP Code
Foreign Country

Form 1099-DIV Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Ownership: (defaults to taxpayer)
Check if Taxpayer X
Check if Spouse . . . .
Check if Joint . . . .

Payer's name . . . . NATIONAL FINANCIAL SERVICES LLC

Box 1a	Total ordinary dividends	1,017.32
	U.S. government interest, if any, included in box 1a	
Box 1b	Qualified dividends	939.50
	Adjusted qualified dividends	
Box 2a	Total capital gain distributions	234.99
Box 2b	Unrecaptured Section 1250 gain	5.88
Box 2c	Section 1202 gain eligible for 50% exclusion on QSB stock (See tax help)	
	Section 1202 gain eligible for 60% exclusion	
	Section 1202 gain eligible for 75% exclusion	
	Section 1202 gain eligible for 100% exclusion	
Box 2d	Collectibles (28%) gain	
Box 2e	Section 897 ordinary dividends	
Box 2f	Section 897 capital gain	
Box 3	Nondividend distributions	1.01
Box 4	**Federal income tax withheld**	
Box 5	Section 199A dividends	50.30
	Adjusted 199A dividends	
Box 6	Investment expenses	
Box 7	Foreign tax paid (All income is considered passive. See Help)	3.12
	a Check to deduct foreign taxes on Schedule A . . . . OR	
	b **DoubleClick** to link to a copy of Form 1116	
	c For Form 1116, select which column . . . . A B C	
	d Total foreign source income	
Box 8	Foreign country or U.S. possession . . . . *(Imported name:)*	VARIOUS
	Check this box if foreign tax is from a mutual fund or a regulated investment company. See Tax Help for additional information.	
Box 9	Cash liquidation distributions	
Box 10	Noncash (fair market value) liquidation distributions	
Box 11	FATCA filing requirement	
Box 12	Exempt-interest dividends	

Tax-exempt Interest Dividends State Allocation
For each row, enter state ID in column (a) and enter percent in column (b) **or** amount in column (c).

	(a) State or Territory ID	(b) Percent of total interest dividends for state	(c) Amount of interest dividends for state
Enter resident state ID . . . ►			
Enter each nonresident state on a separate row ► or Enter XX for all nonresident states (that aren't filed) i.e. you own a fund with no resident state dividends.			
Total . . . ►			

State where the dividends were earned. Postal code (such as "CA" or "NY") . . . .

Box 13
a Specified private activity bond amount included in box 12 above
OR
b Percent of private activity bond amount included in . . . . %

Box 14 State	**Box 15** State identification no.	**Box 16** State tax withheld

I confirm that the state withholding identification number(s) are accurate

Adjustments to Dividends or ESOP Distribution

Check the box that identifies the type of adjustment being made or if ESOP distribution:
N Nominee distribution
H Other adjustment
D ESOP distribution
Enter nominee or other adjustment amount (enter as positive)

Additional Payer and Recipient Information

Payer's TIN 04-3523567
Payer's address and ZIP code
Street 499 WASHINGTON BLVD
City JERSEY CITY
State NJ ZIP Code 07310
Foreign Country

Recipient's address and ZIP code
Transfer address from Federal Information Wks
Street
City
State ZIP Code
Foreign Country

Forms 1099-MISC / 1099-NEC Summary 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Box	Description	Taxpayer	Spouse	Total
	Form 1099-MISC Summary			
1	Total Rents			
	▶ Schedule C			
	▶ Schedule E			
	▶ Form 4835			
	▶ Other Income			
2	Total Royalties			
	▶ Schedule C			
	▶ Schedule E			
3	Total Other income	3,800.		3,800.
	▶ Schedule C			
	▶ Schedule F			
	▶ Form 4835			
	For Form 1040:			
	▶ Winnings (Prizes, etc.)			
	▶ Tribal Gaming			
	▶ Alaska Permanent Fund			
	▶ Strike Benefit Income			
	▶ Medicaid waiver payments			
	▶ California Middle Class Tax Refund			
	▶ Other Income	3,800.		3,800.
4	Federal tax withheld			
5	Fishing boat proceeds			
6	Medical and health care payments			
8	Substitute payments			
9	Total Crop insurance proceeds			
	▶ Schedule F			
	▶ Form 4835			
10	Gross proceeds paid to an attorney			
	▶ Taxable amount			
11	Fish purchased for resale			
12	Section 409A deferrals			
13	Excess golden parachute payments			
14	Nonqualified deferred compensation			
15	State tax withheld – total			
Total	Boxes 1-3, 5-14	3,800.		3,800.

Box	Description	Taxpayer	Spouse	Total
	Form 1099-NEC Summary			
1	Total Nonemployee compensation			
	▶ Schedule C			
	▶ Schedule F			
	▶ Wages			
	▶ Other Income			
4	Federal tax withheld			
5	State tax withheld – total			

Form **1099-MISC** **Miscellaneous Income** **2022**
► Keep for your records

Name	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Payer's Name . . . . State of California
Payer's TIN . . . . **EIN** . 68-0204061 **or** **SSN** .
Account number *(for your records only)* . . . .

☐ **Spouse's 1099-MISC** ☐ **Do not transfer this 1099-MISC to next year**

For each type of 1099-MISC income, select the appropriate form or schedule in your return on which to report this income. Double-click in the field next to the form's name and when the window appears, either "select or create" the copy on which you want to report the 1099-MISC income. See Help.

Box 1	Rents. . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule C; Form 4835 Schedule E; ☐ Other Income	
Box 2	Royalties. . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule C Schedule E	
Box 3	Other income . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule C; Form 4835 Schedule F ☐ Winnings (Prizes, etc.) ☐ Tribal Member Gaming Payments ☐ From Alaska Permanent Fund ☒ Other Income ☐ Back Wages from Lawsuit. Amount: ☐ Strike Benefit Income ☐ Medicaid waiver payments excludible from gross income ☐ Olympic or Paralympic Prize Money Yes ☐ No ☒ California Middle Class Tax Refund	600.00
Box 4	Federal income tax withheld	
Box 5	Fishing boat proceeds . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 6	Medical and health care payments . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 8	Substitute payments in lieu of dividends or interest	
Box 9	Crop insurance proceeds. . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule F Form 4835	
Box 10	Gross proceeds paid to an attorney . . . . Taxable amount from box 10 to Schedule C . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 11	Fish purchased for resale . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 12	Section 409A deferrals	
Box 13	FATCA filing requirement	☐
Box 14	Excess golden parachute payments. . . . . *Report 20% excise tax on Form 1040*	
Box 15	Nonqualified deferred compensation	
Boxes 16-18	State tax withheld — 1st state . . . . State name (two letters) — 1st state. . . State ID number — 1st state. . . . State income — 1st state . . . . State tax withheld — 2nd state. . . . . State name (two letters) — 2nd state . . State ID number — 2nd state . . . State income — 2nd state . . . . I confirm that the state withholding identification number(s) are accurate	☐

Additional Payer and Recipient Information

Payer's address and ZIP code	**Recipient's address and ZIP code**
	Transfer address from Federal Information Wks . ☐
Street	Street
City	City
State ZIP Code	State ZIP Code
Foreign Country	Foreign Country

Form **1099-MISC** **Miscellaneous Income** **2022**

► Keep for your records

Name	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI	024-88-7197

Payer's Name . . . . Santa Clara Valley Water District
Payer's TIN . . . . **EIN** . 94-1695531 **or** **SSN** .
Account number *(for your records only)* . . . .

☐ **Spouse's 1099-MISC** ☐ **Do not transfer this 1099-MISC to next year**

For each type of 1099-MISC income, select the appropriate form or schedule in your return on which to report this income. Double-click in the field next to the form's name and when the window appears, either "select or create" the copy on which you want to report the 1099-MISC income. See Help.

Box	Description	Amount
Box 1	Rents. . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule C / Form 4835 Schedule E / ☐ Other Income	
Box 2	Royalties. . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule C Schedule E	
Box 3	Other income . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule C / Form 4835 Schedule F ☐ Winnings (Prizes, etc.) ☐ Tribal Member Gaming Payments ☐ From Alaska Permanent Fund X Other Income ☐ Back Wages from Lawsuit. Amount: ☐ Strike Benefit Income ☐ Medicaid waiver payments excludible from gross income ☐ Olympic or Paralympic Prize Money Yes ☐ No X California Middle Class Tax Refund	3,200.00
Box 4	Federal income tax withheld	
Box 5	Fishing boat proceeds . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 6	Medical and health care payments . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 8	Substitute payments in lieu of dividends or interest	
Box 9	Crop insurance proceeds. . . . . ***Required:*** *double-click to select the form on which to report this income:* Schedule F Form 4835	
Box 10	Gross proceeds paid to an attorney . . . . Taxable amount from box 10 to Schedule C . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 11	Fish purchased for resale . . . . ***Required:*** *double-click to select the Schedule C on which to report this income:* Schedule C	
Box 12	Section 409A deferrals	
Box 13	FATCA filing requirement	☐
Box 14	Excess golden parachute payments. . . . . *Report 20% excise tax on Form 1040*	
Box 15	Nonqualified deferred compensation	
Boxes 16-18	State tax withheld — 1st state . . . . State name (two letters) — 1st state. . . State ID number — 1st state. . . . State income — 1st state . . . . State tax withheld — 2nd state. . . . . State name (two letters) — 2nd state . . State ID number — 2nd state . . . State income — 2nd state . . . . I confirm that the state withholding identification number(s) are accurate . . . . ☐	

Additional Payer and Recipient Information

Payer's address and ZIP code	**Recipient's address and ZIP code**
	Transfer address from Federal Information Wks . ☐
Street	Street
City	City
State ZIP Code	State ZIP Code
Foreign Country	Foreign Country

Qualified Business Income Deduction Summary 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

	QuickZoom to QBI Component Worksheet ►		
	QuickZoom to Form 8995 ►		
	QuickZoom to Form 8995-A ►		
1	Trade or business name		Net QBI
2	Net qualified business income (QBI) from qualified trades or businesses		
3	Loss from previous year		
4	Sum of activities with gains (only positive amounts from table on line 1)		
5	Sum of activities with losses (only negative amounts from table on line 1)		
6	Check if using Simplified Computation (Form 8995)	X	
7	QBI component from Form 8995 line 5 or Form 8995A line 16		
8	QBI loss carryover from Form 8895 line 16 or Form 8995A Schedule C line 6		0.
9	Total REIT dividends		158.
10	PTP Income from non-SSTBs		
11	PTP Income from SSTBs		
12	Allowed PTP Income from SSTBs		
13	Total Allowed PTP income (sum of line 10 and line 12)		
14	Carryover REIT/PTP losses from prior year		
15	Total REIT/PTP income		158.
16	20% of total REIT/PTP income		32.
17	Disallowed REIT/PTP loss		0.
18	Combined QBI Amount (QBI component plus 20% of REIT/PTP income)		32.
19	Taxable income before qualified business income deduction	248,041.	
20	Net capital gains	3,309.	
21	Taxable income minus net capital gains. If zero or less, enter -0-		244,732.
22	20% of taxable income minus net capital gains		48,946.
23	QBI deduction before DPAD *Lesser of Combined QBI Amount or 20% of taxable income minus cap gains*		32.
24	Section 199A(g) deduction for domestic production activities		
25	**Total 199A (QBI) deduction** (sum of lines 23 and 24)		32.

Form 1040 Line 16 | **Qualified Dividends and Capital Gain Tax Worksheet** | **2022**

► Keep for your records

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security Number: 024-88-7197

1	Enter the amount from Form 1040 or 1040-SR, line 15			1	248,009.		
2	Enter the amount from Form 1040 or 1040-SR, line 3a	2	3,309.				
3	Are you filing Schedule D? [X] **Yes**. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or loss, enter -0-	3	0.				
	[ ] **No**. Enter the amount from Form 1040 or 1040-SR, line 7.						
4	Add lines 2 and 3	4	3,309.				
5	Subtract line 4 from line 1. If zero or less, enter -0-			5	244,700.		
6	Enter: $41,675 if single or married filing separately, $83,350 if mfj or qualifying surviving spouse, $55,800 if head of household.			6	83,350.		
7	Enter the smaller of line 1 or line 6			7	83,350.		
8	Enter the smaller of line 5 or line 7			8	83,350.		
9	Subtract line 8 from line 7 (this amount taxed at 0%)			9	0.		
10	Enter the smaller of line 1 or line 4			10	3,309.		
11	Enter the amount from line 9			11	0.		
12	Subtract line 11 from line 10			12	3,309.		
13	Enter: $459,750 if single, $258,600 if married filing separately, $517,200 if mfj or qualifying surviving spouse, $488,500 if head of household.			13	517,200.		
14	Enter the smaller of line 1 or line 13			14	248,009.		
15	Add lines 5 and 9			15	244,700.		
16	Subtract line 15 from line 14. If zero or less, enter -0-			16	3,309.		
17	Enter the smaller of line 12 or line 16			17	3,309.		
18	Multiply line 17 by 15**%** (0.15)					18	496.
19	Add lines 9 and 17			19	3,309.		
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	46,399.
23	Add lines 18, 21, and 22					23	46,895.
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 this tax. If the amount on line 1 is $100,000 or more, use the Tax Computation Worksheet					24	47,193.
25	**Tax on all taxable income.** Enter the **smaller** of line 23 or line 24 here and on Form 1040 or 1040-SR, line 16					25	46,895.

Capital Loss Carryforward Worksheet 2023

Capital Loss Carryforward from 2022 to 2023

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

			Regular Tax	Alternative Minimum Tax
1	Enter the amount from 2022 Form 1040, line 15. If a loss, enter as a negative amount	1	248,009.	292,584.
2	Enter the loss from 2022 Schedule D, line 21, as a positive amount	2	3,000.	3,000.
3	Combine lines 1 and 2. If zero or less, enter -0-	3	251,009.	295,584.
4	Enter the **smaller** of line 2 or line 3	4	3,000.	3,000.
	If line 7 of 2022 Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9			
5	Enter the loss from 2022 Schedule D, line 7, as a positive amount	5	14,870.	14,870.
6	Enter any gain from 2022 Schedule D, line 15. If a loss, enter -0-	6	0.	0.
7	Add lines 4 and 6	7	3,000.	3,000.
8	**Short-term capital loss carryforward to 2023.** Subtract line 7 from line 5. If zero or less, enter -0- ►	8	11,870.	11,870.
	If line 15 of Schedule D is a loss, go to line 9; otherwise, skip lines 9 thru 13.			
9	Enter the loss from 2022 Schedule D, line 15, as a positive amount	9	1,020.	1,016.
10	Enter any gain from 2022 Schedule D, line 7. If a loss, enter -0-	10	0.	0.
11	Subtract line 5 from line 4. If zero or less, enter -0-	11	0.	0.
12	Add lines 10 and 11	12	0.	0.
13	**Long-term capital loss carryforward to 2023.** Subtract line 12 from line 9. If zero or less, enter -0- ►	13	1,020.	1,016.

Exercise of Stock Options Worksheet

Includes Vesting of Restricted Stock Units and Purchase of ESPP Shares (Buy and Hold)

► Keep for your records

2022

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security Number: 024-88-7197

Part I Company and Employee Information

1 a Company name . . . Landing AI US Corp

b Stock symbol . . . ►

2 Employee is (check one):

a [X] Taxpayer

b [ ] Spouse

Part II Incentive Stock Option (ISO)

3 Enter stock grant and acquisition information in columns (b) through (i) for incentive stock options exercised and held (not sold) in 2022. *(Box numbers refer to Form 3921; see Tax Help.)*

			Grant Information		Acquisition Information			
(a) Lot #	**(b)** Rprtd on Form 3921?	**(c)** Number of Shares (Box 5)	**(d)** Date Option Granted (Box 1)	**(e)** Exercise Price Per Share (Box 3)	**(f)** Date Option Exercised (Box 2)	**(g)** FMV/Share on Exercise Date (Box 4)	**(h)** Bargain Element Per Share	**(i)** Fees Paid (if any)
1	X	15683.0000	04/14/21	0.1200	05/02/22	0.9600	0.8400	
2	X	9651.0000	04/14/21	0.1200	12/09/22	0.6900	0.5700	

4 Alternative Minimum Tax (AMT) Summary

	AMT	Regular Tax	Adjustment
a Exercise of ISO (Form 6251, line 2i) . . .	18,674.79	0.00	18,674.79

Part III Non-Qualified Stock Option (NQSO)

5 Enter stock grant and exercise information in columns (b) through (h) for non-qualified stock options exercised and held (not sold) in 2022.

		Grant Information		Acquisition Information			
(a) Lot #	**(b)** Number of Shares	**(c)** Date Option Granted	**(d)** Exercise Price Per Share	**(e)** Date Option Exercised	**(f)** FMV/Share on Exercise Date	**(g)** Bargain Element Per Share	**(h)** Fees Paid (if any)

6 Total compensation income . . .

Part IV **Restricted Stock Unit (RSU)**

7 Enter vesting information in columns (b) through (g) for Restricted Stock Units vested but not sold in 2022.

(a) Lot #	**(b)** Number of Shares	**(c)** Date Shares Vested	**(d)** FMV/Share on Vesting Date	**(e)** Price Paid Per Share (if any)	**(f)** Fees Paid (if any)	**(g)** Number of Shares Withheld (if any)

8 Computation of compensation income and basis of shares.

(a) Lot #	**(b)** Market Price	**(c)** Amount Paid	**(d)** Compensation Income	**(e)** Net Shares	**(f)** Basis Total	**(g)** Basis Per Share
Total						
Total for 2022						

Part V **Employee Stock Purchase Plan (ESPP)**

9 Plan discount percent (if none, enter zero) . . . . . ► ________ %

10 For each transfer of stock to an employee from an ESPP in 2022, enter grant and acquisition information in columns (b) through (j) for all shares purchased but not sold. *(Box numbers refer to Form 3922; see Tax Help.)*

			Grant Information			Acquisition Information			
(a) Lot #	**(b)** Rprtd on Form 3922?	**(c)** Number of Shares (Box 6)	**(d)** Date Option Granted (Box 1)	**(e)** FMV/Share on Grant Date (Box 3)	**(f)** Price/Share as if Exercise on Grant Date (Box 8)	**(g)** Date Option Exercised (Box 2)	**(h)** FMV/Share on Exercise Date (Box 4)	**(i)** Exercise Price Paid Per Share (Box 5)	**(j)** Fees Paid (if any)

Form 1099-B Worksheet

► Keep for your records

2022

Name(s) Shown on Return	Social Security No.
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Name of reporting financial institution ► CHARLES SCHWAB & CO., INC.
Acct Number . . . . ► 83261678 **Reporter's Tax ID** . . . ► 94-1737782

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

Form 8949 Reporting Exception Transactions

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

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

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

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

Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.

8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	178,612.07	191,922.90	-13,310.83		-13,310.83	
Short term sales with cost basis reported to the IRS						
Box D	36,476.79	37,724.87	-1,248.08		-1,248.08	
Long term sales with cost basis reported to the IRS						
Totals	215,088.86	229,647.77	-14,558.91		-14,558.91	

Form 8949 and Schedule D Totals

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

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	178,610.00	191,923.00			-13,313.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D	36,477.00	37,723.00			-1,246.00
Form 8949, Box E					
Form 8949, Box F					

Total Federal Backup Withholding . . . .

State ID

State Backup Witholding . . . .

Total State Backup Withholding . . . .

Total Collectible Gain . . . .

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

PDF Attachment

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

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

Form 1099-B Worksheet

► Keep for your records

2022

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security No.: 024-88-7197

Name of reporting financial institution ► National Financial Services LLC
Acct Number . . . . ► X85114553 **Reporter's Tax ID** . . . ► 04-3523567

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

Form 8949 Reporting Exception Transactions

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

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

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

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

Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.

8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	0.59	0.62	-0.03	0.03	0.00	W
Short term sales with cost basis reported to the IRS						
Box D	9.78	12.53	-2.75	2.75	0.00	W
Long term sales with cost basis reported to the IRS						
Totals	10.37	13.15	-2.78	2.78	0.00	

Form 8949 and Schedule D Totals

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

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	0.00	1.00	0.00	W	-1.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D	9.00	14.00	3.00	W	-2.00
Form 8949, Box E					
Form 8949, Box F					

Total Federal Backup Withholding . . . .

State ID

State Backup Witholding . . . .

Total State Backup Withholding . . . .

Total Collectible Gain . . . .

Qualified Small Business (QSB) gain (Sec 1202)

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

PDF Attachment

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

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

Form 1099-B Worksheet

► Keep for your records

2022

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security No.: 024-88-7197

Name of reporting financial institution ► Betterment Securities

Acct Number . . . . ► 268011247017696 **Reporter's Tax ID** . . . ►

Owner of account . . . . ►

Transactions were not reported to IRS . . . . ► [ ]

Form 8949 Reporting Exception Transactions

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

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

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

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

Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.

8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	16,777.35	18,340.60	-1,563.25	7.13	-1,556.12	W
Short term sales with cost basis reported to the IRS						
Box D	22.98	30.26	-7.28	0.22	-7.06	W
Long term sales with cost basis reported to the IRS						
Totals	16,800.33	18,370.86	-1,570.53	7.35	-1,563.18	

Form 8949 and Schedule D Totals

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

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

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a	15,704.22	17,149.15			
Form 8949, Box A	1,072.00	1,190.00	7.00	W	-111.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a	13.27	16.51			
Form 8949, Box D	10.00	14.00	0.00	W	-4.00
Form 8949, Box E					
Form 8949, Box F					

Total Federal Backup Withholding . . . .

State ID

State Backup Witholding . . . .

Total State Backup Withholding . . . .

Total Collectible Gain . . . .

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

PDF Attachment

Taxpayer must mail in a statement with more details? . . . . [ ] Yes [X] No

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

Copy #1	**Capital Asset Sales Worksheet** ► Keep for your records	**2022**

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA
Social Security No.: 024-88-7197

Name of reporting financial institution ► CHARLES SCHWAB & CO., INC.
Acct Number . . . . ► 83261678 **Reporter's Tax ID** . . . ► 94-1737782

Owner of account . . . . ►
Transactions were not reported to IRS . . . . ► [ ]

Quick Entry Table

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

Sale# / 8949 Box	Property Description	Date Sold	Date Acquired	Sales Price (Proceeds)	Cost or Other Basis	Disallowed Wash Sale	Adjustment Amount	Adjustment Code(s)	Holding Period	Basis Reported to IRS?	Reported on Form 1099B?
1 D	4.00 SCHWAB US SMALL CAP ETF	01/21/22	01/06/21	370.41	370.44		0.00		L	Yes X	Yes X
2 A	61.00 SCHWAB US SMALL CAP ETF	01/21/22	VARIOUS	5,648.79	6,154.95		0.00		S	Yes X	Yes X
3 D	12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	01/28/22	01/06/21	422.04	429.25		0.00		L	Yes X	Yes X
4 A	102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	01/28/22	VARIOUS	3,587.34	3,937.37		0.00		S	Yes X	Yes X
	See TQUICK									Yes No	Yes No

Check here if this summarizes multiple sales. . . . ►
Check to use worksheet (see help) ► 0
Additional fields for use by Step-by-Step and Import only (See help)
Sale(s) missing info?

Sale Results

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	D	4.00 SCHWAB US SMALL CAP ETF	370.41	370.44			-0.03	L
2	A	61.00 SCHWAB US SMALL CAP ETF	5,648.79	6,154.95			-506.16	S
3	D	12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	422.04	429.25			-7.21	L
4	A	102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	3,587.34	3,937.37			-350.03	S
5	A	76.00 ISHARES CORE MSCI EMERGING ETF	4,222.95	4,604.10			-381.15	S
6	A	184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5,423.29	5,821.04			-397.75	S
7	D	12.00 SCHWAB INTERNATIONAL EQUITY ETF	414.04	447.77			-33.73	L
8	D	42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	1,276.06	1,318.15			-42.09	L
9	A	134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	4,071.28	4,523.66			-452.38	S
10	A	70.00 SCHWAB INTERNATIONAL EQUITY ETF	2,415.20	2,786.94			-371.74	S
11	D	25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	875.64	967.34			-91.70	L
12	A	43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	1,506.11	1,805.03			-298.92	S
13	D	48.00 ISHARES CALIFORNIA MUNI BOND ETF	2,732.16	2,959.19			-227.03	L
14	A	23.00 ISHARES CALIFORNIA MUNI BOND ETF	1,309.16	1,439.53			-130.37	S
15	A	257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	4,952.90	5,423.16			-470.26	S
16	A	191.00 SCHWAB EMERGING MARKETS EQUITY ETF	4,926.85	5,365.04			-438.19	S
17	D	37.00 SCHWAB EMERGING MARKETS EQUITY ETF	954.41	1,015.44			-61.03	L
18	A	18.00 VANGUARD SMALL CAP ETF	3,532.18	3,715.47			-183.29	S
19	D	50.00 SCHWAB US LARGE CAP ETF	2,497.56	2,355.26			142.30	L
		See RQUICK						

Name(s) Shown on Return	Social Security No.
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.

8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	178,612.07	191,922.90	-13,310.83		-13,310.83	
Short term sales with cost basis reported to the IRS						
Box D	36,476.79	37,724.87	-1,248.08		-1,248.08	
Long term sales with cost basis reported to the IRS						
Totals	215,088.86	229,647.77	-14,558.91		-14,558.91	

Form 8949 and Schedule D Totals

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

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

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	178,610.00	191,923.00			-13,313.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D	36,477.00	37,723.00			-1,246.00
Form 8949, Box E					
Form 8949, Box F					

PDF Attachment

Taxpayer must mail in a statement with more details?. . . . . [ ] Yes [X] No

Copy #1

Capital Asset Sales Worksheet

► Keep for your records

2022

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security No.: 024-88-7197

Name of reporting financial institution ► National Financial Services LLC

Acct Number . . . . ► X85114553 **Reporter's Tax ID** . . . ► 04-3523567

Owner of account . . . . ►

Transactions were not reported to IRS . . . . ► ☐

Quick Entry Table

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

Sale# / 8949 Box	Property Description / Date Sold	Date Acquired	Sales Price (Proceeds)	Cost or Other Basis	Disallowed Wash Sale
1	WARNER BROS DISCOVERY INC COM SE 0.3				
D	04/13/22	01/24/18	8.15	10.78	2.63
2	WARNER BROS DISCOVERY INC COM SE 0.018				
D	04/13/22	06/08/20	0.49	0.57	0.08
3	WARNER BROS DISCOVERY INC COM SE 0.024				
D	04/13/22	11/16/20	0.65	0.68	0.03
4	WARNER BROS DISCOVERY INC COM SE 0.018				
D	04/13/22	01/11/21	0.49	0.50	0.01
	See TQUICK				

Sale#	Adjustment Amount	Adjustment Code(s)	Holding Period	Basis Reported to IRS?	Reported on Form 1099B?	Check to use worksheet (see help)	
1	0.00		L	Yes X	Yes X		0
2	0.00		L	Yes X	Yes X		0
3	0.00		L	Yes X	Yes X		0
4	0.00		L	Yes X	Yes X		0

Additional fields for use by Step-by-Step and Import only (See help)

Check here if this summarizes multiple sales. . . . ►

Sale(s) missing info?

Sale Results

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	D	WARNER BROS DISCOVERY INC COM SE 0.3	8.15	10.78	W	2.63	0.00	L
2	D	WARNER BROS DISCOVERY INC COM SE 0.018	0.49	0.57	W	0.08	0.00	L
3	D	WARNER BROS DISCOVERY INC COM SE 0.024	0.65	0.68	W	0.03	0.00	L
4	D	WARNER BROS DISCOVERY INC COM SE 0.018	0.49	0.50	W	0.01	0.00	L
5	A	WARNER BROS DISCOVERY INC COM SE 0.004	0.10	0.10			0.00	S
6	A	WARNER BROS DISCOVERY INC COM SE 0.018	0.49	0.52	W	0.03	0.00	S

Name(s) Shown on Return	Social Security No.
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.

8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	0.59	0.62	-0.03	0.03	0.00	W
Short term sales with cost basis reported to the IRS						
Box D	9.78	12.53	-2.75	2.75	0.00	W
Long term sales with cost basis reported to the IRS						
Totals	10.37	13.15	-2.78	2.78	0.00	

Form 8949 and Schedule D Totals

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

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

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a					
Form 8949, Box A	0.00	1.00	0.00	W	-1.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a					
Form 8949, Box D	9.00	14.00	3.00	W	-2.00
Form 8949, Box E					
Form 8949, Box F					

PDF Attachment

Taxpayer must mail in a statement with more details?. . . . . [ ] Yes [X] No

Copy #1

Capital Asset Sales Worksheet

► Keep for your records

2022

Name(s) Shown on Return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social Security No.: 024-88-7197

Name of reporting financial institution ► Betterment Securities

Acct Number . . . . ► 268011247017696 **Reporter's Tax ID** . . . ►

Owner of account . . . . ►

Transactions were not reported to IRS . . . . ►

Quick Entry Table

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

Sale# / 8949 Box	Property Description / Date Sold	Date Acquired	Sales Price (Proceeds)	Cost or Other Basis	Disallowed Wash Sale
Adjustment Amount	**Adjustment Code(s)**	**Holding Period**	**Basis Reported to IRS?**	**Reported on Form 1099B?**	
Additional fields for use by Step-by-Step and Import only (See help)					
1	4.539722 sh. Schwab U.S. REIT ETF Class O		Check here if this summarizes multiple sales. . . . ►		
A	05/09/22	08/24/21	101.60	108.00	0.95
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
2	0.674761 sh. Schwab U.S. REIT ETF Class O		Check here if this summarizes multiple sales. . . . ►		
D	09/22/22	08/24/21	13.27	16.51	
		L	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
3	0.209717 sh. Vanguard Small-Cap Value ETF Class O		Check here if this summarizes multiple sales. . . . ►		
A	06/13/22	08/24/21	32.27	36.00	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
4	1.496259 sh. Vanguard FTSE Developed Markets Class O		Check here if this summarizes multiple sales. . . . ►		
A	02/24/22	08/24/21	69.46	78.00	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
	See TQUICK		Check here if this summarizes multiple sales. . . . ►		
			Yes No	Yes No	
Check to use worksheet (see help) ►					

Sale(s) missing info?

Sale Results

#	8949 Box	Description	Sale Proceeds	Cost Basis	Adj. Code(s)	Adjustment Amount	Gain or (Loss)	S/L
1	A	4.539722 sh. Schwab U.S. REIT ETF Class O	101.60	108.00	W	0.95	-5.45	S
2	D	Form 8949 exception; reported on Sch D Line 8a	13.27	16.51	BYPASS8949		-3.24	L
3	A	Form 8949 exception; reported on Sch D Line 1a	32.27	36.00	BYPASS8949		-3.73	S
4	A	Form 8949 exception; reported on Sch D Line 1a	69.46	78.00	BYPASS8949		-8.54	S
5	A	Form 8949 exception; reported on Sch D Line 1a	38.63	42.00	BYPASS8949		-3.37	S
6	A	Form 8949 exception; reported on Sch D Line 1a	194.39	210.00	BYPASS8949		-15.61	S
7	A	Form 8949 exception; reported on Sch D Line 1a	50.16	54.00	BYPASS8949		-3.84	S
8	A	1.177394 sh. Vanguard FTSE Emerging Markets Class O	52.11	60.00	W	1.73	-6.16	S
9	D	0.258829 sh. Vanguard FTSE Emerging Markets Class O	9.71	13.75	W	0.22	-3.82	L
10	A	Form 8949 exception; reported on Sch D Line 1a	63.56	70.14	BYPASS8949		-6.58	S
11	A	Form 8949 exception; reported on Sch D Line 1a	21.05	23.98	BYPASS8949		-2.93	S
12	A	Form 8949 exception; reported on Sch D Line 1a	45.69	52.25	BYPASS8949		-6.56	S
13	A	Form 8949 exception; reported on Sch D Line 1a	25.47	28.16	BYPASS8949		-2.69	S
14	A	Form 8949 exception; reported on Sch D Line 1a	128.97	141.30	BYPASS8949		-12.33	S
15	A	Form 8949 exception; reported on Sch D Line 1a	34.00	36.77	BYPASS8949		-2.77	S
16	A	0.003339 sh. Vanguard FTSE Emerging Markets Class O	0.16	0.18	W	0.01	-0.01	S
17	A	0.002187 sh. Vanguard FTSE Emerging Markets Class O	0.11	0.12	W	0.01	0.00	S
18	A	0.010515 sh. Vanguard FTSE Emerging Markets Class O	0.52	0.56	W	0.04	0.00	S
19	A	Form 8949 exception; reported on Sch D Line 1a	0.47	0.56	BYPASS8949		-0.09	S
		See RQUICK						

Name(s) Shown on Return	Social Security No.
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

Gains and losses by "8949 Box" (i.e. the Box to be checked on Form 8949) to assist in reconciling the transactions in the Quick Entry Table with a brokerage statement.

8949 Box	Proceeds	Cost Basis	Gain/(Loss)	Adjustment Amt	Adj Gain/(Loss)	Code(s)
Box A	16,777.35	18,340.60	-1,563.25	7.13	-1,556.12	W
Short term sales with cost basis reported to the IRS						
Box D	22.98	30.26	-7.28	0.22	-7.06	W
Long term sales with cost basis reported to the IRS						
Totals	16,800.33	18,370.86	-1,570.53	7.35	-1,563.18	

Form 8949 and Schedule D Totals

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

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

Location on tax return	Proceeds	Cost Basis	Adjustment Amt	Code(s)	Adj Gain/(Loss)
Sch D, Line 1a	15,704.22	17,149.15			
Form 8949, Box A	1,072.00	1,190.00	7.00	W	-111.00
Form 8949, Box B					
Form 8949, Box C					
Sch D, Line 8a	13.27	16.51			
Form 8949, Box D	10.00	14.00	0.00	W	-4.00
Form 8949, Box E					
Form 8949, Box F					

PDF Attachment

Taxpayer must mail in a statement with more details?. . . . . [ ] Yes [X] No

Tax Payments Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Estimated Tax Payments for 2022 (If more than 4 payments for any state or locality, see Tax Help)

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1	04/18/22		04/18/22			04/18/22		
2	06/15/22		06/15/22			06/15/22		
3	09/15/22		09/15/22			09/15/22		
4	01/17/23		01/17/23			01/17/23		
5								
Tot Estimated Payments . . .								

Tax Payments Other Than Withholding (If multiple states, see Tax Help)	Federal	State	ID	Local	ID
6 Overpayments applied to 2022					
7 Credited by estates and trusts					
8 **Totals** Lines 1 through 7					
9 2022 extensions					

Taxes Withheld From:					Federal	State	Local
10	Forms W-2				41,115.	19,271.	
11	Forms W-2G						
12	Forms 1099-R						
13	Forms 1099-MISC, 1099-NEC, 1099-K, 1099-G .						
14	Schedules K-1						
15	Forms 1099-INT, DIV and OID						
16	Social Security and Railroad Benefits						
17	Form 1099-B	St		Loc			
18 a	Other withholding	St		Loc			
b	Other withholding	St		Loc			
c	Other withholding	St		Loc			
d	Positive Adjustment . . .	St		Loc			
e	Negative Adjustment . .	St		Loc			
f	Additional Medicare Tax.				1.		
19	**Total Withholding** Lines 10 through 18f				41,116.	19,271.	
20	**Total Tax Payments for 2022**				41,116.	19,271.	

Prior Year Taxes Paid In 2022 (If multiple states or localities, see Tax Help)	State	ID	Local	ID
21 Tax paid with 2021 extensions				
22 2021 estimated tax paid after 12/31/2021				
23 Balance due paid with 2021 return				
24 Other (amended returns, installment payments, etc) . .				

Earned Income Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I – Earned Income Credit Worksheet Computation

		Taxpayer	Spouse	Total
1	**If filing Schedule SE:**			
a	Net self-employment income			
b	Optional Method and Church Employee income			
c	Add lines 1a and 1b			
d	One-half of self-employment tax			
e	Subtract line 1d from line 1c			
2	**If not required to file Schedule SE:**			
a	Net farm profit or (loss)			
b	Net nonfarm profit or (loss)			
c	Add lines 2a and 2b			
3	**If filing Schedule C as a statutory employee,** enter the amount from line 1 of that Schedule C			
4	Add lines 1e, 2c and 3. To EIC Wks, line 5			

Part II – Form 2441 and Standard Deduction Worksheet Computations

		Taxpayer	Spouse	Total
5	Net self-employment earnings (line 4 above)			
6	Wages, salaries, and tips less distributions from nonqualified or section 457 plans, etc	170,318.	98,536.	268,854.
7 a	Taxable employer-provided adoption benefits			
b	Foreign earned income exclusion			
8	Add lines 5 through 7b. To Form 2441, lines 18 and 19	170,318.	98,536.	268,854.
9 a	Taxable dependent care benefits			
b	Nontaxable combat pay			
10	Add lines 8, 9a & 9b . To Form 2441, lines 4 and 5	170,318.	98,536.	268,854.
11	Scholarship or fellowship income not on W-2 plus wages while incarcerated			
12	SE exempt earnings less nontaxable income			
13	Distributions from nonqualified/Sec. 457 plans			
14	Add lines 5, 6, 7a, 9a and 11 through 13. To Standard Deduction Worksheet	170,318.	98,536.	268,854.

Part III – IRA Deduction Worksheet Computation

		Taxpayer	Spouse	Total
15	Net self-employment income or (loss)			
16 a	Wages, salaries, tips, etc	170,318.	98,536.	268,854.
b2	Amount of ln. b1 for graduate/postgrad studies			
17	Net self-employment loss			
18	Alimony received			
19	Nontaxable combat pay			
20	Foreign earned income exclusion			
21	Keogh, SEP or SIMPLE deduction			
22	Combine lines 15 through 21. To IRA Wks, ln 2	170,318.	98,536.	268,854.

Part IV – Schedule 8812 and Credit Limit Worksheet B Computations

		Taxpayer	Spouse	Total
23	Self-employed, church and statutory employees			
24	Wages, salaries, tips, etc	170,318.	98,536.	268,854.
25	Nontaxable combat pay			
26	Combine lines 23 through 25. To Schedule 8812, line 18a & Credit Limit Wks B, line 3	170,318.	98,536.	268,854.

Federal Carryover Worksheet 2022

► Keep for your records

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

2021 State and Local Income Tax Information

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With-held/Pmts	(e) Paid With Return	(f) Total Over-payment	(g) Applied Amount
CA			27,912.		5,153.	
Totals . .			27,912.		5,153.	

2021 State Extension Information

(a) State	(b) Paid With Extension

2021 Locality Extension Information

(a) Locality	(b) Paid With Extension

2021 State Estimates Information

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

2021 Locality Estimates Information

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

2021 State Taxes Due Information

(a) State	(e) Paid With Return

2021 Locality Taxes Due Information

(a) Locality	(e) Paid With Return

2021 State Refund Applied Information

(a) State	(g) Applied Amount

2021 Locality Refund Applied Information

(a) Locality	(g) Applied Amount

2021 State Tax Refund Information

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment
CA	27,912.	5,153.

2021 Locality Tax Refund Information

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

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA 024-88-7197

Other Tax and Income Information		2021	2022
1 Filing status	1	2 MFJ	2 MFJ
2 Number of exemptions for blind or over 65 (0 - 4)	2		
3 Itemized deductions	3	24,033.	24,852.
4 Check box if required to itemize deductions	4	☐	☐
5 Adjusted gross income	5	348,709.	273,941.
6 Tax liability for Form 2210 or Form 2210-F	6	62,524.	38,771.
7 Alternative minimum tax	7		0.
8 Federal overpayment applied to next year estimated tax	8		

QuickZoom to the IRA Information Worksheet for IRA information ►

Excess Contributions		2021	2022
9 a Taxpayer's excess Archer MSA contributions as of 12/31	9 a		
b Spouse's excess Archer MSA contributions as of 12/31	b		
10 a Taxpayer's excess Coverdell ESA contributions as of 12/31	10 a		
b Spouse's excess Coverdell ESA contributions as of 12/31	b		
11 a Taxpayer's excess HSA contributions as of 12/31	11 a		
b Spouse's excess HSA contributions as of 12/31	b		

Loss and Expense Carryovers Note: Enter all entries as a positive amount		2021	2022
12 a Short-term capital loss	12 a		11,870.
b AMT Short-term capital loss	b		11,870.
13 a Long-term capital loss	13 a		1,020.
b AMT Long-term capital loss	b		1,016.
14 a Net operating loss available to carry forward	14 a		
b AMT Net operating loss available to carry forward	b		
15 a Investment interest expense disallowed	15 a		
b AMT Investment interest expense disallowed	b		
16 Nonrecaptured net Section 1231 losses from: a 2022	16 a		
b 2021	b		
c 2020	c		
d 2019	d		
e 2018	e		
f 2017	f		
17 AMT Nonrecap'd net Sec 1231 losses from: a 2022	17 a		
b 2021	b		
c 2020	c		
d 2019	d		
e 2018	e		
f 2017	f		

Credit Carryovers		2021	2022
18 General business credit	18		
19 Adoption credit from: a 2022	19 a		
b 2021	b		
c 2020	c		
d 2019	d		
e 2018	e		
f 2017	f		
20 Mortgage interest credit from: a 2022	20 a		
b 2021	b		
c 2020	c		
d 2019	d		
21 Credit for prior year minimum tax	21		
22 District of Columbia first-time homebuyer credit	22		
23 Residential Clean Energy Credit (Previously the Residential energy efficient property credit	23		

LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA 024-88-7197

Other Carryovers		2021	2022
24 Section 179 expense deduction disallowed	24		
25 Excess foreign housing deduction: a Taxpayer (Form 2555, line 46)	25 a		
b Taxpayer (Form 2555, line 48)	b		
c Spouse (Form 2555, line 46)	c		
d Spouse (Form 2555, line 48)	d		

Charitable Contribution Carryovers

26 2021 Carryover of charitable contributions from:	Other Property		Capital Gain		Cash
	(a) 50%	(b) 30%	(c) 30%	(d) 20%	(e) 60%
a 2021					0.
b 2020					
c 2019					
d 2018					
e 2017					

27 2022 Carryover of charitable contributions from:	Other Property		Capital Gain		Cash
	(a) 50%	(b) 30%	(c) 30%	(d) 20%	(e) 60%
a 2022					0.
b 2021					
c 2020					
d 2019					
e 2018					

28 Amount overpaid less earned income credit . . . 7,350.

Qualified Business Income Deduction (Section 199A) carryovers		2021	2022
29 Qualified business loss carryforward	29		
30 Qualified PTP loss carryforward	30		

31 Applicable percentage			
	2018	31 a	
	2019	b	
	2020	c	
	2021	d	100.00

2021 State Capital Loss Carryovers (For users **not** transferring from the prior year)

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

Two-Year Comparison 2022

Name(s) Shown on Return	Social Security Number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	

Income	2021	2022	Difference	%
Wages, salaries, tips, etc	357,890.	268,854.	-89,036.	-24.88
Interest and dividend income	4,341.	4,287.	-54.	-1.24
State tax refund	0.	0.	0.	
Business income (loss)				
Capital and other gains (losses)	-37.	-3,000.	-2,963.	-999.00
IRA distributions				
Pensions and annuities				
Rents and royalties				
Partnerships, S Corps, etc				
Farm income (loss)				
Social security benefits				
Income other than the above	-13,485.	3,800.	17,285.	128.18
Total Income	348,709.	273,941.	-74,768.	-21.44
Adjustments to Income				
Adjusted Gross Income	348,709.	273,941.	-74,768.	-21.44
Itemized Deductions				
Medical and dental				
Income or sales tax	30,568.	21,957.	-8,611.	-28.17
Real estate taxes	9,828.	9,989.	161.	1.64
Personal property and other taxes	359.	166.	-193.	-53.76
Interest paid	13,643.	14,153.	510.	3.74
Gifts to charity	225.	699.	474.	210.67
Casualty and theft losses				
Miscellaneous				
Total Itemized Deductions	23,868.	24,852.	984.	4.12
Standard or Itemized Deduction	25,325.	25,900.	575.	2.27
Qualified Business Income Deduction	21.	32.	11.	52.38
Taxable Income	323,363.	248,009.	-75,354.	-23.30
Income tax	65,375.	46,895.	-18,480.	-28.27
Additional income taxes				
Alternative minimum tax		0.	0.	
Total Income Taxes	65,375.	46,895.	-18,480.	-28.27
Nonbusiness credits		8,477.	8,477.	
Business credits				
Total Credits		8,477.	8,477.	
Self-employment tax				
Other taxes	1,149.	353.	-796.	-69.28
Total Tax After Credits	66,524.	38,771.	-27,753.	-41.72
Withholding	63,103.	41,116.	-21,987.	-34.84
Estimated and extension payments				
Earned income credit				
Additional child tax credit	4,000.		-4,000.	-100.00
Other payments	6,771.		-6,771.	-100.00
Total Payments	73,874.	41,116.	-32,758.	-44.34
Form 2210 penalty				
Applied to next year's estimated tax				
Refund	7,350.	2,345.	-5,005.	-68.10
Balance Due				

Current year effective tax rate 14.02 %

Tax Summary 2022

► Keep for your records

Name (s)
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Total income	273,941.
Adjustments to income	
Adjusted gross income	273,941.
Itemized/standard deduction	25,900.
Qualified business income deduction	32.
Taxable income	248,009.
Tentative tax	46,895.
Additional taxes	
Alternative minimum tax	0.
Total credits	8,477.
Other taxes	353.
Total tax	38,771.
Total payments	41,116.
Estimated tax penalty	
Amount Overpaid	2,345.
Refund	2,345.
Amount Applied to Estimate	
Balance due	0.

Compare to U. S. Averages 2022

► Keep for your records

Name(s) Shown on Return	Social Security No
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Your 2022 adjusted gross income (AGI) . . . . . 273,941.

National adjusted gross income range used below . . . . . from 250,000. to 999,999,999.

Note: National average amounts have been adjusted for inflation. See Help for details.

Selected Income, Deductions, and Credits	Actual Per Return	National Average
Salaries and wages	268,854.	436,693.
Taxable interest	268.	15,883.
Tax-exempt interest	93.	26,676.
Dividends	4,019.	53,988.
Business net income less loss		89,923.
Net capital gain		356,089.
Net capital loss	-3,000.	2,757.
Taxable IRAs		89,778.
Taxable pensions and annuities		70,467.
Rent and royalty net income less loss		30,750.
Partnership and S corporation net income less loss		353,333.
Taxable social security benefits		35,481.
Medical and dental expenses deduction		53,770.
Taxes paid deduction	10,000.	10,841.
Interest paid deduction	14,153.	27,267.
Charitable contributions deduction	699.	55,673.
Total itemized deductions	24,852.	90,394.
Child care credit		623.
Education tax credits		0.
Child tax credit	4,000.	0.
Retirement savings contributions credit		0.
Earned income credit		0.

Other Information	Actual Per Return	National Average
Adjusted gross income	273,941.	797,628.
Taxable income	248,009.	717,055.
Income tax	46,895.	183,508.
Alternative minimum tax	0.	26,751.
Total tax liability	38,771.	189,288.

Estimated Tax Payment Options

Name:	LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA
SSN:	024-88-7197

	Prepare My 2023 Estimated Taxes Based on	**Tax Amount**
[ ]	90% of tax on your 2023 estimated taxable income	0.
[ ]	100% of tax on your 2023 estimated taxable income	0.
[ ]	66-2/3% of tax on your 2023 estimated taxable income (for farmers and fishermen only, see Tax Help)	0.
[X]	100% (110%) of your 2022 taxes (prior-year exception) **Note:** If your 2022 taxes were less than $1000, see Tax Help	42,648.

Amount of Estimated Taxes to Pay in 2023	
Taxes based on method above	42,648.
Expected withholding for 2023 (2022 actual withholding)	41,116.
Taxes due after withholding	1,532.
Estimates you've already paid	
Last year's overpayment you applied to this year	
Balance of estimated taxes due	1,532.

Round My Payments Up

- [ ] To the next $10
- [ ] To the next $100

Prepare Estimated Tax Payment Vouchers

- [X] The amount of estimated taxes due is $1,000 or more (see Tax Help)
- [ ] Even if the amount of estimated taxes due is less than $1,000
- [ ] No, do not prepare estimated tax payment vouchers

Schedule of Estimated Tax Payments for 2023

Check the box for the payment date due next. We will prepare your vouchers based on your choice.

[ ]	Payment number 1, due April 18, 2023	383.
[ ]	Payment number 2, due June 15, 2023	383.
[ ]	Payment number 3, due September 15, 2023	383.
[ ]	Payment number 4, due January 16, 2024	383.

Total estimated tax payments for 2023	1,532.

Print Estimated Tax Vouchers

- [X] Yes, print those prepared by program
- [ ] No, I will use those supplied by the I.R.S. and write in the amounts

Smart Worksheets From 2022 Federal Tax Return

SMART WORKSHEET FOR: Schedule B: Interest and Dividend Income

Interest Income Smart Worksheet

Payer's Name	Box 1		Box 2	Box 3	Box 8		Box 9
To access Form 1099-INT **Double-Click** on payer	Interest Income	Typ Int	Early Withdraw Penalty	US Savings Bond/Treas. Obligations	Tax-exempt Interest	ST ID*	Private Activity Bond
wells fargo bank	36.98						
NATIONAL FINANCIAL SERVICES LLC	0.43						
loanDepot	17.33						
BANK OF AMERICA, N.A.	24.10						
loandepot com llc	103.42						
CHARLES SCHWAB & CO., INC.	85.28						

SMART WORKSHEET FOR: Schedule B: Interest and Dividend Income

Dividend Income Smart Worksheet

Payer's Name
To access 1099-DIV, **Double-Click** from Payer

Payer's Name	Box 1a Tot Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Capital Gain Distributions	Box 2b Unrecap. Sec 1250	Box 3 Nondividend Distributions	Box 12 Exempt- int Dividends	State ID*	Private Actvty Bond
Betterment Securities	229.42	151.43	0.00	0.00	0.00			
CHARLES SCHWAB & CO., INC.	2,771.81	2,218.55	0.73			92.75	CA	0.00
NATIONAL FINANCIAL SERVICES LLC	1,017.32	939.50	234.99	5.88	1.01			

SMART WORKSHEET FOR: Form 8889: Health Savings Accounts (Taxpayer)

Line 3 Smart Worksheet

A Select your coverage for each month below. Select Family for any month you had Self-only coverage and your spouse had family coverage. Select None for for any month you were covered by Medicare.

1	January ►		None		Self-only		Family	7,300.
2	February ►		None		Self-only		Family	7,300.
3	March ►		None		Self-only		Family	7,300.
4	April ►		None		Self-only		Family	7,300.
5	May ►		None		Self-only		Family	7,300.
6	June ►		None		Self-only		Family	7,300.
7	July ►		None		Self-only		Family	7,300.
8	August ►		None		Self-only		Family	7,300.
9	September ►		None		Self-only		Family	7,300.
10	October ►		None		Self-only		Family	7,300.
11	November ►		None		Self-only		Family	7,300.
12	December ►		None		Self-only	X	Family	7,300.

B Maximum allowable contribution. . . . . 7,300.
Greater of: Sum of Lines A1 through A12 divided by 12, OR Line A12

SMART WORKSHEET FOR: Form 8889: Health Savings Accounts (Taxpayer)

Line 6 Smart Worksheet

A	Enter the amount from Line 3 which is related to Family Coverage Plan(s) and both taxpayer and spouse had HSAs during the year	0.
B	Portion of Line 5 attributed to both taxpayer and spouse having coverage under high deductible health plans and each making an HSA contribution during the year. (Line 6A minus Line 4)	0.
C	Portion of Line B amount to be carried to Line 6 of spouse's form	0.
	QuickZoom to Form 8889S ►	
D	Remainder to be carried to Line 6 (Line 5 minus Line C).	7,300.

SMART WORKSHEET FOR: Form 8889: Health Savings Accounts (Taxpayer)

Line 18 Smart Worksheet

Check here if failure to maintain HDHP coverage in 2022 was due to death or disability ☐

A 1	Total HSA contribution in 2021					167.
2	Excess contribution in 2021					
3	Net HSA contribution in 2021					167.

B Check the box below to indicate the type of coverage you had for each month of 2021. Select Family for any month that you had self only coverage and were married to a spouse with family coverage. Select None for any month you were covered by Medicare.

		None	Self-only	Family	
1	January			X	7,200.
2	February			X	7,200.
3	March	X			
4	April	X			
5	May	X			
6	June	X			
7	July	X			
8	August	X			
9	September	X			
10	October	X			
11	November	X			
12	December			X	7,200.

C 1	Total maximum allowable contribution for 2021	1,800.
2	Amount allocated to spouse in 2021	0.
3	Net maximum allowable contribution for 2021	1,800.

SMART WORKSHEET FOR: Form 8995: QB Income Deduction Simplified Computation

Qualified REIT dividend and PTP income Smart Worksheet

Qualified REIT dividends	158.
Qualified PTP income	

SMART WORKSHEET FOR: Form 5695: Residential Energy Credit

Residential Clean Energy Credit Smart Worksheet

Before entering your costs, see the IRS instructions for lines 1 through 8 for requirements that must be met for each property to qualify for the residential clean energy credit.
Include the cost allocable to onsite preparation, assembly, or original installation of property on this smart worksheet.

* Qualified fuel cell property must be installed on or in connection with your main home in the U.S.

A	Amounts you paid for qualified solar electric property	14,339.
B	Amounts you paid for qualified solar water heating property	
C	Amounts you paid for qualified small wind energy property	
D	Amounts you paid for qualified geothermal heat pump property	
D	Amounts you paid for qualified biomass fuel property	
E	Amounts you paid for qualified fuel cell property	
F	Kilowatt capacity of property on line E	

SMART WORKSHEET FOR: Form 5695: Residential Energy Credit

Line 14 – Residential Clean Energy Credit Limit Smart Worksheet

1	Enter the amt from Form 1040, 1040-SR, or 1040-NR, line 18	46,895.
2	Enter the total, if any, of your credits from Sch 3 (Form 1040, 1040-SR, or 1040-NR) lines 1 through 4 and line 6l, and Schedule R, (Form 1040 or 1040-SR), ln 22;	175.
3	Enter the amount, if any, from Form 5695, line 30	0.
4	Nonrefundable child tax credit and credit for other dependents Form 1040, 1040-SR, or 1040-NR, line 19*	1,000.
5	Enter the amount, if any, from Form 8396, line 9	
6	Enter the amount, if any, from Form 8839, line 16	
7	Enter the amount, if any, from Form 8859, line 3	
8	Enter the amount, if any, from Form 8910, line 15	
9	Enter the amount, if any, from Form 8936, line 23	
10	Add lines 2 through 9	1,175.
11	Subtract line 10 from line 1. Also enter this amount on Form 5695, line 14. If zero or less, enter -0- on Form 5695, lines 14 and 15	45,720.

* Include the amount from Schedule 8812 (Form 1040), Credit Limit Worksheet B, line 14, instead of the amount from Form 1040, 1040-SR, or 1040-NR, line 19, if the instructions for Schedule 8812 (Form 1040) direct you to complete Credit Limit Worksheet B.

SMART WORKSHEET FOR: Form 5695: Residential Energy Credit

Energy Efficient Home Improvement Credit Limit Smart Worksheet

A	Enter the amt from Form 1040, 1040-SR, or 1040-NR, line 18	46,895.
B	Enter the total, if any, of your credits from Sch 3 (Form 1040, 1040-SR, or 1040-NR), lines 1 through 4 and negative from line 6l, and Schedule R, (Form 1040 or 1040-SR), line 22	175.
C	Subtract line 2 from line 1. Also enter this amount on Form 5695, line 29. If zero or less, **stop**; you can't take the nonbusiness energy property credit.	46,720.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

(a) Description of Short-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	(d) Date Sold	(e) Sales Price	(f) Cost or Other basis	(g) Gain or Loss Adjustment	(h) Gain or (Loss)
61.00 SCHWAB US SMALL CAP ETF		A			
VARIOUS	01/21/22	5,649.	6,155.		-506.
102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		A			
VARIOUS	01/28/22	3,587.	3,937.		-350.
76.00 ISHARES CORE MSCI EMERGING ETF		A			
08/19/21	02/24/22	4,223.	4,604.		-381.
184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		A			
VARIOUS	02/24/22	5,423.	5,821.		-398.
See Short-term Capital Gains and Losses					
		160,800.	172,597.	7.	-11,790.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

(a) Description of Long-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	(d) Date Sold	(e) Sales Price	(f) Cost or Other basis	(g) Gain or Loss Adjustment	(h) Gain or (Loss)
4.00 SCHWAB US SMALL CAP ETF		D			
01/06/21	01/21/22	370.	370.		0.
12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		D			
01/06/21	01/28/22	422.	429.		-7.
12.00 SCHWAB INTERNATIONAL EQUITY ETF		D			
03/02/21	03/04/22	414.	448.		-34.
42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		D			
VARIOUS	03/04/22	1,276.	1,318.		-42.
See Long-term Capital Gains and Losses					
		34,014.	35,186.	3.	-1,169.

SMART WORKSHEET FOR: Federal Information Worksheet

TurboTax for the Web Filing Status Smart Worksheet

Check this box to override the filing status selected thru Interview . . ☐
Marital Status . . . . ______
Filing Status Selected . . . . ______

SMART WORKSHEET FOR: Dependent Information Worksheet (PRATEEK)

Dependency/EIC Smart Worksheet

NOTE: It is recommended that you answer the questions below using the Step-by-Step mode. That will help insure that answers to the questions are not inconsistent.

A How many months did this person live with you? . . . . The whole year
Note: If born or died in current year and lived with you entire time or qualified missing child select "The whole year". If more than one-half the year select 7 or more

B Who are the parents of this person?
(Used to determine if additional questions are necessary for children of divorced parents.)
- Both Taxpayer and spouse . . . . [X]
- Taxpayer . . . . [ ]
- Spouse . . . . [ ]

C Did this person provide more than 1/2 of their own support? . . . . . [ ] Yes [X] No

D Was this person married on December 31, 2022 and filing a joint return for the year (You may answer **no** if the only reason the joint return is filed is to get a refund of tax withheld or estimated tax payments and neither spouse would have a tax liability on their return if they filed separate returns)? . . . . . [ ] Yes [X] No

Detailed answers for this question. This dependent:
- Was married on December 31, 2022 . . . . . [ ] Yes [X] No
- If married, filed a joint return for the year . . . . . [ ] Yes [ ] No
- If filed joint return, only filed to get a refund of tax withheld or estimated tax payments . . . . . [ ] Yes [ ] No
- If filed married filing separate, neither spouse had a tax liability on their return if they had filed separately . . . . . [ ] Yes [ ] No

E Is this person a Full time student? . . . . . [ ] Yes [ ] No

F Is this person's gross income less than $4,400? . . . . . [ ] Yes [ ] No

1 Did you provide over 1/2 the support for this person?
or
Did you provide over 10% of the support for the person and with other individuals who would be able to claim the person except for the support test over 1/2 the support and all of you have agreed that you alone will claim the person and you have filled out the Multiple Support Declaration, Form 2120, to attach to your return? . . . . . [ ] Yes [ ] No

G Is there an agreement with this person's other parent about who can claim this person as a dependent? . . . . . [ ] Yes [ ] No
Note: The noncustodial parent claiming the exemption for the child must attach to their return Form 8332 from the custodial parent releasing the claim to the exemption for the child

1 TurboTax Web Only:
Is the other parent claiming this dependent per the custody agreement? . . . . . [ ] Yes [ ] No
Has the other parent waived their legal right so you can claim this dependent on your tax return? . . . . . [ ] Yes [ ] No

H Who will be claiming this person as a dependent as a result of:
- an agreement between the parents
- the rules controlling who can claim a qualifying child when the child meets the conditions to be a qualifying child of more than one person?

Taxpayer (includes spouse if married filing joint) in this return? . . . . . [X]
Other parent in different return? . . . . . [ ]
Someone else in different return? . . . . . [ ]

SMART WORKSHEET FOR: Dependent Information Worksheet (PRATEEK)

Child and Dependent Care Expenses, Form 2441, Special Situations Worksheet

Check this box if this person is a qualifying person only for the dependent care expenses because they were not your dependent but would have been except that:
* They received gross income greater than $4,400 or more or
* They filed a joint return . . . . ☐

SMART WORKSHEET FOR: Dependent Information Worksheet (TARA)

Dependency/EIC Smart Worksheet

NOTE: It is recommended that you answer the questions below using the Step-by-Step mode. That will help insure that answers to the questions are not inconsistent.

A How many months did this person live with you? . . . . The whole year
Note: If born or died in current year and lived with you entire time or qualified missing child select "The whole year". If more than one-half the year select 7 or more

B Who are the parents of this person?
(Used to determine if additional questions are necessary for children of divorced parents.)
- Both Taxpayer and spouse . . . . [X]
- Taxpayer . . . . [ ]
- Spouse . . . . [ ]

C Did this person provide more than 1/2 of their own support? . . . . . [ ] Yes [X] No

D Was this person married on December 31, 2022 and filing a joint return for the year (You may answer **no** if the only reason the joint return is filed is to get a refund of tax withheld or estimated tax payments and neither spouse would have a tax liability on their return if they filed separate returns)? . . . . [ ] Yes [ ] No
Detailed answers for this question. This dependent:
- Was married on December 31, 2022 . . . . . [ ] Yes [ ] No
- If married, filed a joint return for the year . . . . . [ ] Yes [ ] No
- If filed joint return, only filed to get a refund of tax withheld or estimated tax payments. . . . . . . [ ] Yes [ ] No
- If filed married filing separate, neither spouse had a tax liability on their return if they had filed separately . . . . [ ] Yes [ ] No

E Is this person a Full time student? . . . . [ ] Yes [ ] No

F Is this person's gross income less than $4,400? . . . . [ ] Yes [ ] No
1 Did you provide over 1/2 the support for this person?
or
Did you provide over 10% of the support for the person and with other individuals who would be able to claim the person except for the support test over 1/2 the support and all of you have agreed that you alone will claim the person and you have filled out the Multiple Support Declaration, Form 2120, to attach to your return? . . . . [ ] Yes [ ] No

G Is there an agreement with this person's other parent about who can claim this person as a dependent? . . . . [ ] Yes [ ] No
Note: The noncustodial parent claiming the exemption for the child must attach to their return Form 8332 from the custodial parent releasing the claim to the exemption for the child
1 TurboTax Web Only:
Is the other parent claiming this dependent per the custody agreement? . . . . [ ] Yes [ ] No
Has the other parent waived their legal right so you can claim this dependent on your tax return? . . . . [ ] Yes [ ] No

H Who will be claiming this person as a dependent as a result of:
- an agreement between the parents
- the rules controlling who can claim a qualifying child when the child meets the conditions to be a qualifying child of more than one person?

Taxpayer (includes spouse if married filing joint) in this return? . . . . [X]
Other parent in different return? . . . . [ ]
Someone else in different return? . . . . [ ]

SMART WORKSHEET FOR: Dependent Information Worksheet (TARA)

Child and Dependent Care Expenses, Form 2441, Special Situations Worksheet

Check this box if this person is a qualifying person only for the dependent care expenses because they were not your dependent but would have been except that:
* They received gross income greater than $4,400 or more or
* They filed a joint return . . . . ☐

SMART WORKSHEET FOR: Form W-2 (Premier healthcare services llc): Wage & Tax Statement

Substitute Form W-2 Smart Worksheet

A Treat as a substitute W-2 and generate a form 4852 . . . . ☐
B Linked substitute W-2 Form 4852 . . . . ► ______
C Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"

D Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"

E **QuickZoom** to completed Form 4852 for reference . . . .► ______

SMART WORKSHEET FOR: Form W-2 (Landing AI US Corp): Wage & Tax Statement

Substitute Form W-2 Smart Worksheet

A Treat as a substitute W-2 and generate a form 4852 . . . . ☐
B Linked substitute W-2 Form 4852 . . . . ► ______
C Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"

D Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"

E **QuickZoom** to completed Form 4852 for reference . . . .► ______

SMART WORKSHEET FOR: Form W-2 (Accenture Flex LLC): Wage & Tax Statement

Substitute Form W-2 Smart Worksheet

A Treat as a substitute W-2 and generate a form 4852 . . . . ☐

B Linked substitute W-2 Form 4852 . . . . ► ____

C Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"

D Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"

E **QuickZoom** to completed Form 4852 for reference . . . . ► ____

SMART WORKSHEET FOR: Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.)

QuickZoom to another copy of **Form 1099-B Worksheet** . . . . ► ____

For sale of a primary residence eligible for gain exclusion, use the **Home Sale Worksheet**. . . . ► ____

QuickZoom to **Form 1099-K** reporting sale(s) of investment assets . . . . ► ____

Form 1099-K reconciliation

☐ If checked, a copy of Form 1099-K with the payer and payment amount shown below has been linked to this worksheet. Total sales proceeds reported on the Capital Asset Sales Worksheet(s) must match the amount shown below.

Payment(s) amount from linked Form 1099-K . . . . ►

SMART WORKSHEET FOR: Form 1099-B Worksheet (National Financial Services LLC)

QuickZoom to another copy of **Form 1099-B Worksheet** . . . . ► ____

For sale of a primary residence eligible for gain exclusion, use the **Home Sale Worksheet**. . . . ► ____

QuickZoom to **Form 1099-K** reporting sale(s) of investment assets . . . . ► ____

Form 1099-K reconciliation

☐ If checked, a copy of Form 1099-K with the payer and payment amount shown below has been linked to this worksheet. Total sales proceeds reported on the Capital Asset Sales Worksheet(s) must match the amount shown below.

Payment(s) amount from linked Form 1099-K . . . . ►

SMART WORKSHEET FOR: Form 1099-B Worksheet (Betterment Securities)

QuickZoom to another copy of **Form 1099-B Worksheet** . . . . ► ___________

For sale of a primary residence eligible for gain exclusion, use the **Home Sale Worksheet**. . . . ► ___________

QuickZoom to **Form 1099-K** reporting sale(s) of investment assets . . . . ► ___________

Form 1099-K reconciliation

☐ If checked, a copy of Form 1099-K with the payer and payment amount shown below has been linked to this worksheet. Total sales proceeds reported on the Capital Asset Sales Worksheet(s) must match the amount shown below.

Payment(s) amount from linked Form 1099-K . . . . ►

SMART WORKSHEET FOR: Earned Income Worksheet

Medicaid Waiver Payments for the Earned Income Credit and Additional Child Tax Credit Smart Worksheet

A Check box if any wages are Medicaid Waiver Payments that you choose to **include** in earned income

Taxpayer . . . . ► ☐

Spouse . . . . ► ☐

SMART WORKSHEET FOR: Estimated Tax Payment Options

For Residents of Guam or the U.S. Virgin Islands Only

☐ Permanent resident of Guam or U.S. Virgin Islands

☐ Nonpermanent resident of Guam or U.S. Virgin Islands

Additional Information From 2022 Federal Tax Return

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

Short-term Capital Gains and Losses **Continuation Statement**

(a) Description of Short-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	**(d) Date Sold**	**(e) Sales Price**	**(f) Cost or Other basis**	**(g) Gain or Loss Adjustment**	**(h) Gain or (Loss)**
134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		A			
VARIOUS	03/04/22	4,071.	4,524.		-453.
70.00 SCHWAB INTERNATIONAL EQUITY ETF		A			
VARIOUS	03/04/22	2,415.	2,787.		-372.
43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		A			
VARIOUS	03/07/22	1,506.	1,805.		-299.
23.00 ISHARES CALIFORNIA MUNI BOND ETF		A			
VARIOUS	04/14/22	1,309.	1,440.		-131.
257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF		A			
02/24/22	04/25/22	4,953.	5,423.		-470.
191.00 SCHWAB EMERGING MARKETS EQUITY ETF		A			
VARIOUS	04/25/22	4,927.	5,365.		-438.
18.00 VANGUARD SMALL CAP ETF		A			
01/21/22	04/28/22	3,532.	3,715.		-183.
94.00 SCHWAB US LARGE CAP ETF		A			
VARIOUS	04/28/22	4,695.	4,791.		-96.
117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		A			
01/28/22	05/06/22	3,693.	4,005.		-312.
29.00 XTRACKERS INTER REAL ESTETF		A			
VARIOUS	05/09/22	678.	842.		-164.
107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		A			
VARIOUS	06/10/22	5,180.	5,484.		-304.
225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		A			
04/25/22	06/13/22	5,901.	6,137.		-236.
126.00 ISHARES CORE MSCI EMERGING ETF		A			
VARIOUS	06/13/22	6,168.	6,491.		-323.
135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF		A			
VARIOUS	06/13/22	7,052.	7,523.		-471.
11.00 VANGUARD SMALL CAP ETF		A			
01/21/22	06/16/22	1,884.	2,271.		-387.
123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		A			
03/04/22	06/16/22	5,015.	5,341.		-326.
130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		A			
VARIOUS	06/16/22	3,978.	4,278.		-300.
62.00 VANGUARD FTSE DEVELOPED MARKETS ETF		A			
03/04/22	06/23/22	2,489.	2,804.		-315.
20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF		A			
03/07/22	07/05/22	1,989.	2,316.		-327.
44.00 INVESCO FTSE RAFI US 1500 SMALL-MID		A			
06/10/22	07/12/22	6,851.	7,133.		-282.
245.00 SCHWAB EMERGING MARKETS EQUITY ETF		A			
06/13/22	07/14/22	5,935.	6,157.		-222.
355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF		A			
06/13/22	07/14/22	6,100.	6,613.		-513.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT
Short-term Capital Gains and Losses — Continuation Statement

(a) Description of Short-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	**(d) Date Sold**	**(e) Sales Price**	**(f) Cost or Other basis**	**(g) Gain or Loss Adjustment**	**(h) Gain or (Loss)**
177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		A			
VARIOUS	09/07/22	4,811.	5,095.		-284.
44.00 VANGUARD GLBAL EX US REAL ESTATE ETF		A			
05/09/22	09/20/22	1,819.	2,018.		-199.
135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		A			
06/16/22	09/22/22	3,661.	3,957.		-296.
181.00 ISHARES CORE MSCI EMERGING ETF		A			
07/14/22	09/23/22	8,051.	8,502.		-451.
63.00 INVESCO FTSE RAFI US 1000 ETF		A			
VARIOUS	09/23/22	8,964.	9,526.		-562.
167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		A			
VARIOUS	09/23/22	3,904.	4,219.		-315.
153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		A			
VARIOUS	09/23/22	6,605.	6,993.		-388.
172.00 SCHWAB INTERNATIONAL EQUITY ETF		A			
VARIOUS	09/23/22	4,924.	5,385.		-461.
89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		A			
VARIOUS	09/27/22	2,430.	2,775.		-345.
248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		A			
07/14/22	09/29/22	5,808.	6,094.		-286.
145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		A			
VARIOUS	10/12/22	5,097.	5,502.		-405.
349.00 SCHWAB EMERGING MARKETS EQUITY ETF		A			
09/23/22	10/24/22	7,517.	8,043.		-526.
211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		A			
VARIOUS	10/24/22	5,816.	6,052.		-236.
WARNER BROS DISCOVERY INC COM SE 0.004		A			
05/18/21	04/13/22	0.	0.		0.
WARNER BROS DISCOVERY INC COM SE 0.018		A			
05/18/21	04/13/22	0.	1.	0.	-1.
Betterment Securities, Summary of category A (not eligible for 8949 exception)		A			
Various	Various	1,072.	1,190.	7.	-111.
Total		160,800.	172,597.	7.	-11,790.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT
Long-term Capital Gains and Losses — Continuation Statement

(a) Description of Long-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	**(d) Date Sold**	**(e) Sales Price**	**(f) Cost or Other basis**	**(g) Gain or Loss Adjustment**	**(h) Gain or (Loss)**
25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		D			
VARIOUS	03/07/22	876.	967.		-91.
48.00 ISHARES CALIFORNIA MUNI BOND ETF		D			
VARIOUS	04/14/22	2,732.	2,959.		-227.
37.00 SCHWAB EMERGING MARKETS EQUITY ETF		D			
VARIOUS	04/25/22	954.	1,015.		-61.
50.00 SCHWAB US LARGE CAP ETF		D			
VARIOUS	04/28/22	2,498.	2,355.		143.
46.00 XTRACKERS INTER REAL ESTETF		D			
VARIOUS	05/09/22	1,076.	1,278.		-202.
43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		D			
VARIOUS	06/10/22	2,082.	2,252.		-170.
27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		D			
VARIOUS	06/13/22	708.	775.		-67.
40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF		D			
VARIOUS	06/13/22	2,090.	2,186.		-96.
57.00 VANGUARD FTSE DEVELOPED MARKETS ETF		D			
06/05/20	06/23/22	2,289.	2,307.		-18.
106.00 SCHWAB EMERGING MARKETS EQUITY ETF		D			
VARIOUS	07/14/22	2,568.	2,640.		-72.
8.00 VANGUARD GLBAL EX US REAL ESTATE ETF		D			
VARIOUS	09/20/22	331.	447.		-116.
83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		D			
VARIOUS	09/22/22	2,251.	2,263.		-12.
1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		D			
10/02/20	09/23/22	23.	28.		-5.
7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		D			
01/06/21	09/23/22	302.	316.		-14.
48.00 SCHWAB INTERNATIONAL EQUITY ETF		D			
VARIOUS	09/23/22	1,374.	1,433.		-59.
1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		D			
12/20/18	09/27/22	27.	29.		-2.
229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		D			
VARIOUS	09/29/22	5,363.	5,391.		-28.
155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		D			
06/22/20	10/12/22	5,449.	5,447.		2.
12.00 SCHWAB EMERGING MARKETS EQUITY ETF		D			
VARIOUS	10/24/22	258.	271.		-13.
27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		D			
VARIOUS	10/24/22	744.	799.		-55.
WARNER BROS DISCOVERY INC COM SE 0.3		D			
01/24/18	04/13/22	8.	11.	3.	0.
WARNER BROS DISCOVERY INC COM SE 0.018		D			
06/08/20	04/13/22	0.	1.	0.	-1.
WARNER BROS DISCOVERY INC COM SE 0.024		D			
11/16/20	04/13/22	1.	1.	0.	0.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT
Long-term Capital Gains and Losses **Continuation Statement**

(a) Description of Long-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	(d) Date Sold	(e) Sales Price	(f) Cost or Other basis	(g) Gain or Loss Adjustment	(h) Gain or (Loss)
WARNER BROS DISCOVERY INC COM SE 0.018		D			
01/11/21	04/13/22	0.	1.	0.	-1.
Betterment Securities, Summary of category D (not eligible for 8949 exception)					
Various	Various	10.	14.	0.	-4.
		D			
Total		34,014.	35,186.	3.	-1,169.

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

5	76.00 ISHARES CORE MSCI EMERGING ETF		Check here if this summarizes multiple sales . . . ►					
A	02/24/22	08/19/21	4,222.95	4,604.10				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
	0.00						X	
6	184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		Check here if this summarizes multiple sales . . . ►					
A	02/24/22	VARIOUS	5,423.29	5,821.04				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
	0.00						X	
7	12.00 SCHWAB INTERNATIONAL EQUITY ETF		Check here if this summarizes multiple sales . . . ►					
D	03/04/22	03/02/21	414.04	447.77				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
	0.00						X	
8	42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		Check here if this summarizes multiple sales . . . ►					
D	03/04/22	VARIOUS	1,276.06	1,318.15				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
	0.00						X	
9	134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		Check here if this summarizes multiple sales . . . ►					
A	03/04/22	VARIOUS	4,071.28	4,523.66				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
	0.00						X	

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

10	70.00 SCHWAB INTERNATIONAL EQUITY ETF		Check here if this summarizes multiple sales . . . ►					
A	03/04/22	VARIOUS	2,415.20	2,786.94				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
11	25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		Check here if this summarizes multiple sales . . . ►					
D	03/07/22	VARIOUS	875.64	967.34				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
12	43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		Check here if this summarizes multiple sales . . . ►					
A	03/07/22	VARIOUS	1,506.11	1,805.03				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
13	48.00 ISHARES CALIFORNIA MUNI BOND ETF		Check here if this summarizes multiple sales . . . ►					
D	04/14/22	VARIOUS	2,732.16	2,959.19				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
14	23.00 ISHARES CALIFORNIA MUNI BOND ETF		Check here if this summarizes multiple sales . . . ►					
A	04/14/22	VARIOUS	1,309.16	1,439.53				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
15	257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF		Check here if this summarizes multiple sales . . . ►					
A	04/25/22	02/24/22	4,952.90	5,423.16				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
16	191.00 SCHWAB EMERGING MARKETS EQUITY ETF		Check here if this summarizes multiple sales . . . ►					
A	04/25/22	VARIOUS	4,926.85	5,365.04				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
17	37.00 SCHWAB EMERGING MARKETS EQUITY ETF		Check here if this summarizes multiple sales . . . ►					
D	04/25/22	VARIOUS	954.41	1,015.44				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
18	18.00 VANGUARD SMALL CAP ETF		Check here if this summarizes multiple sales . . . ►					
A	04/28/22	01/21/22	3,532.18	3,715.47				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

19	50.00 SCHWAB US LARGE CAP ETF		Check here if this summarizes multiple sales . . . ►				
D	04/28/22	VARIOUS	2,497.56	2,355.26			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
20	94.00 SCHWAB US LARGE CAP ETF		Check here if this summarizes multiple sales . . . ►				
A	04/28/22	VARIOUS	4,695.40	4,790.85			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
21	117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		Check here if this summarizes multiple sales . . . ►				
A	05/06/22	01/28/22	3,692.80	4,004.91			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
22	46.00 XTRACKERS INTER REAL ESTETF		Check here if this summarizes multiple sales . . . ►				
D	05/09/22	VARIOUS	1,076.21	1,277.90			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
23	29.00 XTRACKERS INTER REAL ESTETF		Check here if this summarizes multiple sales . . . ►				
A	05/09/22	VARIOUS	678.48	842.43			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
24	43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		Check here if this summarizes multiple sales . . . ►				
D	06/10/22	VARIOUS	2,081.51	2,252.43			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
25	107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		Check here if this summarizes multiple sales . . . ►				
A	06/10/22	VARIOUS	5,179.57	5,483.76			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
26	225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		Check here if this summarizes multiple sales . . . ►				
A	06/13/22	04/25/22	5,901.19	6,137.19			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
27	126.00 ISHARES CORE MSCI EMERGING ETF		Check here if this summarizes multiple sales . . . ►				
A	06/13/22	VARIOUS	6,167.75	6,490.55			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

28	27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	Check here if this summarizes multiple sales . . . ►						
D	06/13/22	VARIOUS	708.14	775.26				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
29	40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	Check here if this summarizes multiple sales . . . ►						
D	06/13/22	VARIOUS	2,089.52	2,185.53				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
30	135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	Check here if this summarizes multiple sales . . . ►						
A	06/13/22	VARIOUS	7,052.13	7,523.12				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
31	11.00 VANGUARD SMALL CAP ETF	Check here if this summarizes multiple sales . . . ►						
A	06/16/22	01/21/22	1,884.48	2,270.57				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
32	123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	Check here if this summarizes multiple sales . . . ►						
A	06/16/22	03/04/22	5,014.88	5,341.15				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
33	130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	Check here if this summarizes multiple sales . . . ►						
A	06/16/22	VARIOUS	3,977.96	4,278.45				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
34	57.00 VANGUARD FTSE DEVELOPED MARKETS ETF	Check here if this summarizes multiple sales . . . ►						
D	06/23/22	06/05/20	2,288.69	2,306.51				
		L	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
35	62.00 VANGUARD FTSE DEVELOPED MARKETS ETF	Check here if this summarizes multiple sales . . . ►						
A	06/23/22	03/04/22	2,489.45	2,804.03				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	
36	20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF	Check here if this summarizes multiple sales . . . ►						
A	07/05/22	03/07/22	1,989.40	2,316.25				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►		0						
0.00							X	

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

37	44.00 INVESCO FTSE RAFI US 1500 SMALL-MID		Check here if this summarizes multiple sales . . . ►			
A	07/12/22	06/10/22	6,851.34	7,132.88		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
38	245.00 SCHWAB EMERGING MARKETS EQUITY ETF		Check here if this summarizes multiple sales . . . ►			
A	07/14/22	06/13/22	5,934.51	6,157.32		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
39	355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF		Check here if this summarizes multiple sales . . . ►			
A	07/14/22	06/13/22	6,100.18	6,612.73		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
40	106.00 SCHWAB EMERGING MARKETS EQUITY ETF		Check here if this summarizes multiple sales . . . ►			
D	07/14/22	VARIOUS	2,567.59	2,640.39		
		L	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
41	177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		Check here if this summarizes multiple sales . . . ►			
A	09/07/22	VARIOUS	4,810.93	5,095.42		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
42	44.00 VANGUARD GLBAL EX US REAL ESTATE ETF		Check here if this summarizes multiple sales . . . ►			
A	09/20/22	05/09/22	1,818.97	2,017.83		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
43	8.00 VANGUARD GLBAL EX US REAL ESTATE ETF		Check here if this summarizes multiple sales . . . ►			
D	09/20/22	VARIOUS	330.72	446.96		
		L	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
44	135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		Check here if this summarizes multiple sales . . . ►			
A	09/22/22	06/16/22	3,660.81	3,956.77		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X
45	83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		Check here if this summarizes multiple sales . . . ►			
D	09/22/22	VARIOUS	2,250.72	2,262.81		
		L	Yes X	No	Yes X	No
Check to use worksheet (see help) ►		0				
0.00						X

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)
TQUICK Continuation Statement

46	1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		Check here if this summarizes multiple sales . . . ►				
D	09/23/22	10/02/20	23.38	27.56			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
47	7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		Check here if this summarizes multiple sales . . . ►				
D	09/23/22	01/06/21	302.16	315.98			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
48	181.00 ISHARES CORE MSCI EMERGING ETF		Check here if this summarizes multiple sales . . . ►				
A	09/23/22	07/14/22	8,050.63	8,501.97			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
49	63.00 INVESCO FTSE RAFI US 1000 ETF		Check here if this summarizes multiple sales . . . ►				
A	09/23/22	VARIOUS	8,963.68	9,525.91			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
50	167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		Check here if this summarizes multiple sales . . . ►				
A	09/23/22	VARIOUS	3,904.49	4,218.58			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
51	153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		Check here if this summarizes multiple sales . . . ►				
A	09/23/22	VARIOUS	6,604.53	6,993.19			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
52	48.00 SCHWAB INTERNATIONAL EQUITY ETF		Check here if this summarizes multiple sales . . . ►				
D	09/23/22	VARIOUS	1,374.15	1,433.40			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
53	172.00 SCHWAB INTERNATIONAL EQUITY ETF		Check here if this summarizes multiple sales . . . ►				
A	09/23/22	VARIOUS	4,924.01	5,384.68			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	
54	1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		Check here if this summarizes multiple sales . . . ►				
D	09/27/22	12/20/18	27.30	28.82			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
0.00						X	

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

55	89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		Check here if this summarizes multiple sales . . . ►				
A	09/27/22	VARIOUS	2,430.15	2,774.98			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
56	248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		Check here if this summarizes multiple sales . . . ►				
A	09/29/22	07/14/22	5,808.11	6,093.91			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
57	229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		Check here if this summarizes multiple sales . . . ►				
D	09/29/22	VARIOUS	5,363.13	5,390.98			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
58	155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		Check here if this summarizes multiple sales . . . ►				
D	10/12/22	06/22/20	5,448.52	5,446.70			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
59	145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		Check here if this summarizes multiple sales . . . ►				
A	10/12/22	VARIOUS	5,096.99	5,501.65			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
60	349.00 SCHWAB EMERGING MARKETS EQUITY ETF		Check here if this summarizes multiple sales . . . ►				
A	10/24/22	09/23/22	7,516.83	8,043.47			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
61	12.00 SCHWAB EMERGING MARKETS EQUITY ETF		Check here if this summarizes multiple sales . . . ►				
D	10/24/22	VARIOUS	258.46	271.41			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
62	211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		Check here if this summarizes multiple sales . . . ►				
A	10/24/22	VARIOUS	5,816.37	6,052.06			
		S	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X
63	27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		Check here if this summarizes multiple sales . . . ►				
D	10/24/22	VARIOUS	744.27	799.39			
		L	Yes X	No	Yes X	No	
Check to use worksheet (see help) ►		0					
	0.00						X

Form 1099-B Worksheet (CHARLES SCHWAB & CO., INC.) -- Capital Asset Sales Wksht (1)
RQUICK Continuation Statement

20	A	94.00 SCHWAB US LARGE CAP ETF	4,695.40	4,790.85			-95.45	S
21	A	17.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	3,692.80	4,004.91			-312.11	S
22	D	46.00 XTRACKERS INTER REAL ESTETF	1,076.21	1,277.90			-201.69	L
23	A	29.00 XTRACKERS INTER REAL ESTETF	678.48	842.43			-163.95	S
24	D	43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	2,081.51	2,252.43			-170.92	L
25	A	107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	5,179.57	5,483.76			-304.19	S
26	A	225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5,901.19	6,137.19			-236.00	S
27	A	126.00 ISHARES CORE MSCI EMERGING ETF	6,167.75	6,490.55			-322.80	S
28	D	27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	708.14	775.26			-67.12	L
29	D	40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	2,089.52	2,185.53			-96.01	L
30	A	135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	7,052.13	7,523.12			-470.99	S
31	A	11.00 VANGUARD SMALL CAP ETF	1,884.48	2,270.57			-386.09	S
32	A	123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	5,014.88	5,341.15			-326.27	S
33	A	130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	3,977.96	4,278.45			-300.49	S
34	D	57.00 VANGUARD FTSE DEVELOPED MARKETS ETF	2,288.69	2,306.51			-17.82	L
35	A	62.00 VANGUARD FTSE DEVELOPED MARKETS ETF	2,489.45	2,804.03			-314.58	S
36	A	20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF	1,989.40	2,316.25			-326.85	S
37	A	44.00 INVESCO FTSE RAFI US 1500 SMALL-MID	6,851.34	7,132.88			-281.54	S
38	A	245.00 SCHWAB EMERGING MARKETS EQUITY ETF	5,934.51	6,157.32			-222.81	S
39	A	355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	6,100.18	6,612.73			-512.55	S
40	D	106.00 SCHWAB EMERGING MARKETS EQUITY ETF	2,567.59	2,640.39			-72.80	L
41	A	177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	4,810.93	5,095.42			-284.49	S
42	A	44.00 VANGUARD GLBAL EX US REAL ESTATE ETF	1,818.97	2,017.83			-198.86	S
43	D	8.00 VANGUARD GLBAL EX US REAL ESTATE ETF	330.72	446.96			-116.24	L
44	A	35.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	3,660.81	3,956.77			-295.96	S
45	D	3.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	2,250.72	2,262.81			-12.09	L
46	D	1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	23.38	27.56			-4.18	L
47	D	7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	302.16	315.98			-13.82	L
48	A	181.00 ISHARES CORE MSCI EMERGING ETF	8,050.63	8,501.97			-451.34	S
49	A	63.00 INVESCO FTSE RAFI US 1000 ETF	8,963.68	9,525.91			-562.23	S
50	A	167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	3,904.49	4,218.58			-314.09	S
51	A	153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	6,604.53	6,993.19			-388.66	S
52	D	48.00 SCHWAB INTERNATIONAL EQUITY ETF	1,374.15	1,433.40			-59.25	L
53	A	172.00 SCHWAB INTERNATIONAL EQUITY ETF	4,924.01	5,384.68			-460.67	S
54	D	1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	27.30	28.82			-1.52	L
55	A	89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	2,430.15	2,774.98			-344.83	S
56	A	248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5,808.11	6,093.91			-285.80	S
57	D	229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5,363.13	5,390.98			-27.85	L
58	D	155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	5,448.52	5,446.70			1.82	L
59	A	145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	5,096.99	5,501.65			-404.66	S
60	A	349.00 SCHWAB EMERGING MARKETS EQUITY ETF	7,516.83	8,043.47			-526.64	S
61	D	12.00 SCHWAB EMERGING MARKETS EQUITY ETF	258.46	271.41			-12.95	L
62	A	211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	5,816.37	6,052.06			-235.69	S
63	D	27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	744.27	799.39			-55.12	L

Form 1099-B Worksheet (National Financial Services LLC) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

5	WARNER BROS DISCOVERY INC COM SE 0.004		Check here if this summarizes multiple sales . . . ►						
A	04/13/22	05/18/21	0.10	0.10	0.00				
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►		O							
0.00							X		
6	WARNER BROS DISCOVERY INC COM SE 0.018		Check here if this summarizes multiple sales . . . ►						
A	04/13/22	05/18/21	0.49	0.52	0.03				
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►		O							
0.00							X		

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

5	0.292683 sh. Vanguard Mid-Cap Value ETF Class O		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	08/24/21	38.63	42.00					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
6	0.909248 sh. Vanguard Total Stock Market ETF Class O		Check here if this summarizes multiple sales . . . ►						
A	01/24/22	08/24/21	194.39	210.00					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
7	0.382003 sh. Vanguard Value ETF Class O		Check here if this summarizes multiple sales . . . ►						
A	06/14/22	08/24/21	50.16	54.00					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
8	1.177394 sh. Vanguard FTSE Emerging Markets Class O		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	08/24/21	52.11	60.00	1.73				
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
9	0.258829 sh. Vanguard FTSE Emerging Markets Class O		Check here if this summarizes multiple sales . . . ►						
D	09/23/22	08/24/21	9.71	13.75	0.22				
		L	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
10	2.839846 sh. Schwab U.S. REIT ETF Class O		Check here if this summarizes multiple sales . . . ►						
A	05/09/22	09/02/21	63.56	70.14					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

11	0.136794 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	06/13/22	09/02/21	21.05	23.98		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
12	0.984178 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	02/24/22	09/02/21	45.69	52.25		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
13	0.192996 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	06/13/22	09/02/21	25.47	28.16		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
14	0.603258 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	01/24/22	09/02/21	128.97	141.30		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
15	0.258877 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	06/14/22	09/02/21	34.00	36.77		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
16	0.003339 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	01/31/22	09/02/21	0.16	0.18	0.01	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
17	0.002187 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	01/31/22	09/02/21	0.11	0.12	0.01	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
18	0.010515 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	01/31/22	09/02/21	0.52	0.56	0.04	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
19	0.010515 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	03/08/22	09/02/21	0.47	0.56		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

20	0.003339 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	09/02/21	0.15	0.18					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
21	0.725766 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	09/02/21	32.12	38.31					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
22	0.002187 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	09/02/21	0.10	0.12					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
23	3.041216 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	05/09/22	09/16/21	68.06	73.05					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
24	0.141240 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	09/16/21	21.74	24.21					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
25	0.956918 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	02/24/22	09/16/21	44.42	50.42					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
26	0.194613 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	09/16/21	25.68	27.89					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
27	0.605920 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	01/24/22	09/16/21	129.54	139.41					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
28	0.259422 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/14/22	09/16/21	34.07	36.07					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

29	0.791702 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	09/16/21	35.04	40.68					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
30	0.013477 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	02/24/22	09/27/21	0.63	0.70					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
31	0.025094 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	09/27/21	1.11	1.27					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
32	0.023215 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	02/24/22	09/29/21	1.08	1.18					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
33	0.126032 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/22/22	10/01/21	2.48	2.90					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
34	0.007149 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	02/24/22	10/01/21	0.33	0.36					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
35	3.156872 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/22/22	10/04/21	62.06	73.05					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
36	0.121871 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	10/04/21	18.75	21.13					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
37	1.049861 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	02/24/22	10/04/21	48.73	53.06					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

38	0.185552 sh. Vanguard Mid-Cap Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/13/22	10/04/21		24.49	26.43				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
39	0.640290 sh. Vanguard Total Stock Market ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	01/24/22	10/04/21		136.89	143.06				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
40	0.250018 sh. Vanguard Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/14/22	10/04/21		32.83	34.45				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
41	0.819338 sh. Vanguard FTSE Emerging Markets Class 0			Check here if this summarizes multiple sales . . . ►					
A	03/08/22	10/04/21		36.26	40.59				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
42	2.976120 sh. Schwab U.S. REIT ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	05/09/22	10/18/21		66.61	71.04				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
43	0.142817 sh. Vanguard Small-Cap Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/13/22	10/18/21		21.98	25.23				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
44	1.045957 sh. Vanguard FTSE Developed Markets Class 0			Check here if this summarizes multiple sales . . . ►					
A	02/24/22	10/18/21		48.55	53.94				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
45	0.199175 sh. Vanguard Mid-Cap Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/13/22	10/18/21		26.29	28.98				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
46	0.596750 sh. Vanguard Total Stock Market ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	01/24/22	10/18/21		127.58	137.70				
		S		Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

47	0.264903 sh. Vanguard Value ETF Class 0	Check here if this summarizes multiple sales . . . ►						
A	06/14/22	10/18/21	34.79	37.24				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
48	0.721299 sh. Vanguard FTSE Emerging Markets Class 0	Check here if this summarizes multiple sales . . . ►						
A	03/08/22	10/18/21	31.92	37.32				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
49	2.717908 sh. Schwab U.S. REIT ETF Class 0	Check here if this summarizes multiple sales . . . ►						
A	05/09/22	11/02/21	60.83	67.02				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
50	0.130589 sh. Vanguard Small-Cap Value ETF Class 0	Check here if this summarizes multiple sales . . . ►						
A	06/13/22	11/02/21	20.10	23.60				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
51	1.015813 sh. Vanguard FTSE Developed Markets Class 0	Check here if this summarizes multiple sales . . . ►						
A	02/24/22	11/02/21	47.15	53.32				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
52	0.199782 sh. Vanguard Mid-Cap Value ETF Class 0	Check here if this summarizes multiple sales . . . ►						
A	06/13/22	11/02/21	26.37	29.37				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
53	0.551146 sh. Vanguard Total Stock Market ETF Class 0	Check here if this summarizes multiple sales . . . ►						
A	01/24/22	11/02/21	117.83	131.44				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
54	0.251288 sh. Vanguard Value ETF Class 0	Check here if this summarizes multiple sales . . . ►						
A	06/14/22	11/02/21	33.00	36.08				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								
55	0.983007 sh. Vanguard FTSE Emerging Markets Class 0	Check here if this summarizes multiple sales . . . ►						
A	03/08/22	11/02/21	43.51	49.75				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help) ►								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

56	2.998396 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	05/09/22	11/16/21	67.10	74.78						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
57	0.123399 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	06/13/22	11/16/21	18.99	22.84						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
58	1.071333 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►							
A	02/24/22	11/16/21	49.73	56.32						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
59	0.051665 sh. Vanguard Global ex-U.S. Real Estate ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	09/30/22	11/16/21	1.97	2.98	1.01					
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
60	0.174288 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	06/13/22	11/16/21	23.00	26.30						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
61	0.002043 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	01/24/22	11/16/21	0.44	0.50						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
62	0.567274 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	01/24/22	11/16/21	121.28	137.41						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
63	0.250430 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	06/14/22	11/16/21	32.89	36.44						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
64	0.714148 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►							
A	03/08/22	11/16/21	31.61	37.05						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

65	2.674774 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	05/09/22	12/02/21	59.86	64.89						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
66	0.170038 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	06/13/22	12/02/21	26.17	29.25						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
67	1.097361 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►							
A	02/24/22	12/02/21	50.94	54.89						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
68	0.209729 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	06/13/22	12/02/21	27.68	30.05						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
69	0.595308 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	01/24/22	12/02/21	127.27	138.29						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
70	0.259042 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	06/14/22	12/02/21	34.02	36.17						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
71	0.761737 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►							
A	03/08/22	12/02/21	33.71	38.03						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
72	0.086465 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►							
A	03/08/22	12/15/21	3.83	4.21						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										
73	2.521618 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►							
A	05/09/22	12/16/21	56.43	63.87						
		S	Yes	X	No	Yes	X	No		
Check to use worksheet (see help) ►										

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

74	0.142055 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	06/13/22	12/16/21	21.86	25.04		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
75	1.075991 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	02/24/22	12/16/21	49.95	55.08		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
76	0.055983 sh. Vanguard Global ex-U.S. Real Estate ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	11/30/22	12/16/21	2.33	3.13	0.80	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
77	0.176514 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	06/13/22	12/16/21	23.29	26.23		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
78	0.592171 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	01/24/22	12/16/21	126.60	141.60		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
79	0.206428 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	06/14/22	12/16/21	27.11	30.25		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
80	0.979600 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	03/08/22	12/16/21	43.36	48.50		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
81	0.095219 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	02/24/22	12/27/21	4.42	4.86		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
82	0.081765 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	03/08/22	12/27/21	3.62	4.04		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

83	0.081971 sh. Vanguard FTSE Emerging Markets Class O			Check here if this summarizes multiple sales . . . ►						
A	03/08/22	12/29/21		3.63	4.01					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
84	2.194656 sh. Schwab U.S. REIT ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	05/09/22	01/03/22		49.12	57.50					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
85	0.120265 sh. Vanguard Small-Cap Value ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	06/13/22	01/03/22		18.51	21.81					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
86	1.067823 sh. Vanguard FTSE Developed Markets Class O			Check here if this summarizes multiple sales . . . ►						
A	02/24/22	01/03/22		49.57	54.79					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
87	0.054301 sh. Vanguard Global ex-U.S. Real Estate ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	12/30/22	01/03/22		2.25	2.93	0.68				
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
88	0.005795 sh. Vanguard Mid-Cap Value ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	06/13/22	01/03/22		0.76	0.89					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
89	0.184359 sh. Vanguard Mid-Cap Value ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	06/13/22	01/03/22		24.33	27.83					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
90	0.005795 sh. Vanguard Mid-Cap Value ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	02/28/22	01/03/22		0.84	0.87	0.03				
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										
91	0.616408 sh. Vanguard Total Stock Market ETF Class O			Check here if this summarizes multiple sales . . . ►						
A	01/24/22	01/03/22		131.78	149.22					
			S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►										

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

92	0.271969 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/14/22	01/03/22	35.71	40.08				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
93	0.751303 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	03/08/22	01/03/22	33.25	37.36				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
94	0.171910 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/09/22	01/04/22	3.85	4.51				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
95	0.043410 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/09/22	01/04/22	0.97	1.06				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
96	0.043410 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	03/31/22	01/04/22	1.10	1.14	0.04			
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
97	0.002851 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	01/04/22	0.44	0.52				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
98	0.009865 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	02/24/22	01/04/22	0.46	0.51				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
99	0.006642 sh. Vanguard Global ex-U.S. Real Estate ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	12/30/22	01/04/22	0.27	0.36	0.09			
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
100	0.001480 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	01/24/22	01/04/22	0.32	0.36				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

101	0.054976 sh. Vanguard FTSE Emerging Markets Class 0			Check here if this summarizes multiple sales . . . ►					
A	03/08/22	01/04/22		2.43	2.74				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
102	3.858248 sh. Schwab U.S. REIT ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	05/09/22	01/18/22		86.35	94.72				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
103	0.113508 sh. Vanguard Small-Cap Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/13/22	01/18/22		17.47	20.31				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
104	0.871476 sh. Vanguard FTSE Developed Markets Class 0			Check here if this summarizes multiple sales . . . ►					
A	02/24/22	01/18/22		40.45	44.21				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
105	0.141041 sh. Vanguard Mid-Cap Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/13/22	01/18/22		18.61	21.19				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
106	0.712501 sh. Vanguard Total Stock Market ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	01/24/22	01/18/22		152.33	165.40				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
107	0.162438 sh. Vanguard Value ETF Class 0			Check here if this summarizes multiple sales . . . ►					
A	06/14/22	01/18/22		21.33	24.01				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
108	0.459007 sh. Vanguard FTSE Emerging Markets Class 0			Check here if this summarizes multiple sales . . . ►					
A	03/08/22	01/18/22		20.32	23.01				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									
109	15.757088 sh. iShares Core S&P Total U.S. Stock M... Class 0			Check here if this summarizes multiple sales . . . ►					
A	05/02/22	01/24/22		1,426.49	1,489.36				
			S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

110	0.028286 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	01/24/22	4.35	4.64					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
111	0.008578 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	01/24/22	1.13	1.20					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
112	1.378224 sh. iShares Core S&P Total U.S. Stock Ma... Class 0		Check here if this summarizes multiple sales . . . ►						
A	05/02/22	02/02/22	124.77	140.00					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
113	2.930184 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	05/09/22	02/02/22	65.58	71.35					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
114	0.149994 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	02/02/22	23.08	25.82					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
115	1.071958 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	02/24/22	02/02/22	49.76	53.48					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
116	0.193852 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	02/02/22	25.58	28.57					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
117	0.242298 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/14/22	02/02/22	31.82	35.47					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
118	0.759896 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	03/08/22	02/02/22	33.63	37.82					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

119	1.543546 sh. iShares Core S&P Total U.S. Stock Ma... Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/02/22	02/16/22	139.74	153.66				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
120	4.041044 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	09/22/22	02/16/22	79.45	94.52				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
121	0.084668 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	02/16/22	13.03	14.85				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
122	0.968744 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	02/24/22	02/16/22	44.97	48.04				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
123	0.153247 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	02/16/22	20.22	22.63				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
124	0.220308 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/14/22	02/16/22	28.93	32.09				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
125	0.540535 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	03/08/22	02/16/22	23.92	27.27				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
126	9.416122 sh. iShares Core MSCI EAFE ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/09/22	02/24/22	582.48	634.27				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
127	1.195100 sh. iShares Core MSCI EAFE ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/09/22	03/02/22	73.93	81.47				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

128	1.953602 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	09/22/22	03/02/22	38.41	45.75				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
129	0.117504 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	03/02/22	18.08	20.28				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
130	0.199569 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	03/02/22	26.34	28.69				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
131	0.605947 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	03/02/22	114.33	132.46				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
132	0.221586 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/14/22	03/02/22	29.10	31.72				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
133	1.062020 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	03/08/22	03/02/22	47.01	49.83				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
134	9.684975 sh. iShares Core MSCI Emerging Markets ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/16/22	03/08/22	468.95	513.11				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
135	0.830013 sh. iShares Core MSCI EAFE ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/09/22	03/16/22	51.34	56.25				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
136	1.184064 sh. iShares Core MSCI Emerging Markets ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/16/22	03/16/22	57.33	63.75				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

137	1.902673 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	05/09/22	03/16/22	42.58	45.55					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
138	0.129599 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	03/16/22	19.94	22.44					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
139	0.150827 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	03/16/22	19.90	21.98					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
140	0.697123 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	03/16/22	131.53	151.68					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
141	0.202876 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/14/22	03/16/22	26.64	29.35					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
142	0.000541 sh. iShares Core MSCI Emerging Markets ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/16/22	03/28/22	0.03	0.03					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
143	0.034386 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	05/09/22	04/01/22	0.77	0.86					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
144	0.041055 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	04/01/22	6.32	7.24					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
145	0.136703 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	08/30/22	04/01/22	5.57	6.60					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

146	0.469471 sh. iShares Core MSCI Emerging Markets ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/16/22	04/04/22	22.73	26.90				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
147	0.026057 sh. iShares Core MSCI Emerging Markets ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/31/22	04/04/22	1.38	1.49				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
148	0.022273 sh. iShares Core MSCI Emerging Markets ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	04/29/22	04/04/22	1.18	1.28				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
149	2.623361 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	05/09/22	04/04/22	58.71	66.03				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
150	0.157168 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	04/04/22	24.19	27.66				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
151	1.098949 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	08/30/22	04/04/22	44.74	53.31				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
152	0.249146 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	04/04/22	32.88	37.21				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
153	0.553534 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	04/04/22	104.44	126.87				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
154	0.344423 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/14/22	04/04/22	45.23	50.83				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

155	2.043183 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	05/09/22	04/18/22	45.73	51.10					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
156	0.109957 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	04/18/22	16.92	19.06					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
157	1.278074 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	08/30/22	04/18/22	52.03	59.98					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
158	0.103107 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	04/18/22	13.61	15.40					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
159	0.772163 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/13/22	04/18/22	145.69	170.37					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
160	0.121780 sh. Vanguard Value ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	06/14/22	04/18/22	15.99	18.01					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
161	0.048733 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	08/31/22	04/18/22	2.02	2.20	0.18				
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
162	0.048733 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	04/18/22	1.83	2.17					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
163	1.221561 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	04/18/22	45.85	55.23					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

164	3.013075 sh. Schwab U.S. REIT ETF Class O		Check here if this summarizes multiple sales					
A	05/09/22	05/02/22	67.43	71.44				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
165	0.135407 sh. Vanguard Small-Cap Value ETF Class O		Check here if this summarizes multiple sales					
A	06/13/22	05/02/22	20.84	22.33				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
166	0.002093 sh. Vanguard Small-Cap Value ETF Class O		Check here if this summarizes multiple sales					
A	06/13/22	05/02/22	0.32	0.34				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
167	1.064284 sh. Vanguard FTSE Developed Markets Class O		Check here if this summarizes multiple sales					
A	08/30/22	05/02/22	43.33	47.35				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
168	0.182068 sh. Vanguard Mid-Cap Value ETF Class O		Check here if this summarizes multiple sales					
A	06/13/22	05/02/22	24.03	25.89				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
169	0.001214 sh. Vanguard Mid-Cap Value ETF Class O		Check here if this summarizes multiple sales					
A	06/13/22	05/02/22	0.16	0.17				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
170	8.198385 sh. Vanguard Total Stock Market ETF Class O		Check here if this summarizes multiple sales					
A	06/13/22	05/02/22	1,546.87	1,674.93				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
171	0.759630 sh. Vanguard Total Stock Market ETF Class O		Check here if this summarizes multiple sales					
A	06/13/22	05/02/22	143.33	156.78				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								
172	0.254234 sh. Vanguard Value ETF Class O		Check here if this summarizes multiple sales					
A	06/14/22	05/02/22	33.39	35.73				
		S	Yes	X	No	Yes	X	No
Check to use worksheet (see help)								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

173	0.744444 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	09/23/22	05/02/22	27.94	32.16				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
174	16.639019 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	08/30/22	05/09/22	677.37	712.15				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
175	9.774819 sh. Vanguard REIT Index ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	05/09/22	865.46	947.18				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
176	0.277155 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	09/23/22	05/09/22	10.40	11.38				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
177	0.131473 sh. Vanguard Small-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	05/16/22	20.23	21.20				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
178	0.919043 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►					
A	08/30/22	05/16/22	37.41	39.96				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
179	1.105563 sh. Vanguard REIT Index ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	05/16/22	97.89	106.72				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
180	0.127186 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	05/16/22	16.78	17.89				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								
181	0.782264 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►					
A	06/13/22	05/16/22	147.60	156.75				
		S	Yes X	No	Yes X	No		
Check to use worksheet (see help) ►								

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

182	0.118171 sh. Vanguard Value ETF Class 0	Check here if this summarizes multiple sales . . . ►							
A	06/14/22	05/16/22	15.52	16.57					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
183	0.851727 sh. Vanguard FTSE Emerging Markets Class 0	Check here if this summarizes multiple sales . . . ►							
A	09/23/22	05/16/22	31.97	35.27					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
184	0.103872 sh. Vanguard Small-Cap Value ETF Class 0	Check here if this summarizes multiple sales . . . ►							
A	06/13/22	06/02/22	15.98	17.41					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
185	0.761528 sh. Vanguard FTSE Developed Markets Class 0	Check here if this summarizes multiple sales . . . ►							
A	08/30/22	06/02/22	31.00	34.68					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
186	1.028935 sh. Vanguard REIT Index ETF Class 0	Check here if this summarizes multiple sales . . . ►							
A	06/13/22	06/02/22	91.10	100.28					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
187	0.206115 sh. Vanguard Mid-Cap Value ETF Class 0	Check here if this summarizes multiple sales . . . ►							
A	06/13/22	06/02/22	27.20	29.66					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
188	0.696990 sh. Vanguard Total Stock Market ETF Class 0	Check here if this summarizes multiple sales . . . ►							
A	06/13/22	06/02/22	131.51	143.35					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
189	0.308990 sh. Vanguard Value ETF Class 0	Check here if this summarizes multiple sales . . . ►							
A	06/14/22	06/02/22	40.58	43.96					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
190	0.494282 sh. Vanguard FTSE Emerging Markets Class 0	Check here if this summarizes multiple sales . . . ►							
A	09/23/22	06/02/22	18.55	21.61					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
TQUICK **Continuation Statement**

191	0.016970 sh. iShares Core S&P Total U.S. Stock Ma... Class 0		Check here if this summarizes multiple sales . . . ►		
A	06/30/22	06/13/22	1.41	1.42	0.01
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
192	51.908427 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	06/13/22	1,008.06	1,065.68	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
193	13.287515 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	06/16/22	498.68	548.11	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
194	0.492958 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	06/16/22	18.50	20.30	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
195	0.456805 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	06/27/22	17.14	19.30	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
196	1.941568 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/22/22	07/05/22	38.17	40.87	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
197	1.090752 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	07/05/22	40.94	44.23	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
198	4.224682 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/22/22	07/18/22	83.06	89.69	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					
199	0.010667 sh. Vanguard Mid-Cap Value ETF Class 0		Check here if this summarizes multiple sales . . . ►		
A	07/29/22	07/18/22	1.48	1.40	
		S	Yes X No	Yes X No	
Check to use worksheet (see help) ►					

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

200	0.553524 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	07/18/22	101.54	107.45					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
201	1.392576 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	07/18/22	52.26	56.65					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
202	2.080531 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/22/22	08/02/22	40.90	47.02					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
203	1.237065 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	08/30/22	08/02/22	50.36	52.60					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
204	0.602425 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	08/02/22	110.51	123.22					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
205	1.939470 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	08/02/22	72.79	78.92					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
206	3.395250 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/22/22	08/16/22	66.75	80.06					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
207	1.905708 sh. Vanguard FTSE Developed Markets Class 0		Check here if this summarizes multiple sales . . . ►						
A	08/30/22	08/16/22	77.58	82.46					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									
208	0.512209 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►						
A	09/23/22	08/16/22	93.96	110.34					
		S	Yes	X	No	Yes	X	No	
Check to use worksheet (see help) ►									

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

209	1.025974 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/23/22	08/16/22	38.50	43.45		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
210	17.128109 sh. iShares Core MSCI EAFE ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/30/22	08/30/22	904.36	1,005.42	1.49	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
211	0.640532 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/22/22	08/30/22	12.59	13.97		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
212	1.189729 sh. iShares Core MSCI EAFE ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/30/22	09/02/22	62.82	69.04		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
213	3.635229 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/22/22	09/02/22	71.47	78.63		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
214	0.763045 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/23/22	09/02/22	139.98	152.67		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
215	0.235496 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/23/22	09/02/22	8.84	9.62		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
216	0.653530 sh. iShares Core MSCI EAFE ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/30/22	09/16/22	34.51	37.31		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						
217	4.523396 sh. Schwab U.S. REIT ETF Class 0		Check here if this summarizes multiple sales . . . ►			
A	09/22/22	09/16/22	88.93	93.77		
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►						

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

TQUICK **Continuation Statement**

218	0.761177 sh. Vanguard Total Stock Market ETF Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	09/16/22	139.64	147.95	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►					
219	0.947686 sh. Vanguard FTSE Emerging Markets Class 0		Check here if this summarizes multiple sales . . . ►		
A	09/23/22	09/16/22	35.57	37.68	
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►					
220	0.025072 sh. Vanguard REIT Index ETF Class 0		Check here if this summarizes multiple sales . . . ►		
A	10/31/22	09/22/22	2.08	2.14	0.06
		S	Yes X	No	Yes X	No
Check to use worksheet (see help) ►					

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

RQUICK **Continuation Statement**

20	A	Form 8949 exception; reported on Sch D Line 1a	0.15	0.18	BYPASS8949		-0.03	S
21	A	Form 8949 exception; reported on Sch D Line 1a	32.12	38.31	BYPASS8949		-6.19	S
22	A	Form 8949 exception; reported on Sch D Line 1a	0.10	0.12	BYPASS8949		-0.02	S
23	A	Form 8949 exception; reported on Sch D Line 1a	68.06	73.05	BYPASS8949		-4.99	S
24	A	Form 8949 exception; reported on Sch D Line 1a	21.74	24.21	BYPASS8949		-2.47	S
25	A	Form 8949 exception; reported on Sch D Line 1a	44.42	50.42	BYPASS8949		-6.00	S
26	A	Form 8949 exception; reported on Sch D Line 1a	25.68	27.89	BYPASS8949		-2.21	S
27	A	Form 8949 exception; reported on Sch D Line 1a	129.54	139.41	BYPASS8949		-9.87	S
28	A	Form 8949 exception; reported on Sch D Line 1a	34.07	36.07	BYPASS8949		-2.00	S
29	A	Form 8949 exception; reported on Sch D Line 1a	35.04	40.68	BYPASS8949		-5.64	S
30	A	Form 8949 exception; reported on Sch D Line 1a	0.63	0.70	BYPASS8949		-0.07	S
31	A	Form 8949 exception; reported on Sch D Line 1a	1.11	1.27	BYPASS8949		-0.16	S
32	A	Form 8949 exception; reported on Sch D Line 1a	1.08	1.18	BYPASS8949		-0.10	S
33	A	Form 8949 exception; reported on Sch D Line 1a	2.48	2.90	BYPASS8949		-0.42	S
34	A	Form 8949 exception; reported on Sch D Line 1a	0.33	0.36	BYPASS8949		-0.03	S
35	A	Form 8949 exception; reported on Sch D Line 1a	62.06	73.05	BYPASS8949		-10.99	S
36	A	Form 8949 exception; reported on Sch D Line 1a	18.75	21.13	BYPASS8949		-2.38	S
37	A	Form 8949 exception; reported on Sch D Line 1a	48.73	53.06	BYPASS8949		-4.33	S
38	A	Form 8949 exception; reported on Sch D Line 1a	24.49	26.43	BYPASS8949		-1.94	S
39	A	Form 8949 exception; reported on Sch D Line 1a	136.89	143.06	BYPASS8949		-6.17	S
40	A	Form 8949 exception; reported on Sch D Line 1a	32.83	34.45	BYPASS8949		-1.62	S
41	A	Form 8949 exception; reported on Sch D Line 1a	36.26	40.59	BYPASS8949		-4.33	S
42	A	Form 8949 exception; reported on Sch D Line 1a	66.61	71.04	BYPASS8949		-4.43	S
43	A	Form 8949 exception; reported on Sch D Line 1a	21.98	25.23	BYPASS8949		-3.25	S
44	A	Form 8949 exception; reported on Sch D Line 1a	48.55	53.94	BYPASS8949		-5.39	S
45	A	Form 8949 exception; reported on Sch D Line 1a	26.29	28.98	BYPASS8949		-2.69	S
46	A	Form 8949 exception; reported on Sch D Line 1a	127.58	137.70	BYPASS8949		-10.12	S
47	A	Form 8949 exception; reported on Sch D Line 1a	34.79	37.24	BYPASS8949		-2.45	S
48	A	Form 8949 exception; reported on Sch D Line 1a	31.92	37.32	BYPASS8949		-5.40	S
49	A	Form 8949 exception; reported on Sch D Line 1a	60.83	67.02	BYPASS8949		-6.19	S
50	A	Form 8949 exception; reported on Sch D Line 1a	20.10	23.60	BYPASS8949		-3.50	S

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

RQUICK **Continuation Statement**

51	A	Form 8949 exception; reported on Sch D Line 1a	47.15	53.32	BYPASS8949		-6.17	S
52	A	Form 8949 exception; reported on Sch D Line 1a	26.37	29.37	BYPASS8949		-3.00	S
53	A	Form 8949 exception; reported on Sch D Line 1a	117.83	131.44	BYPASS8949		-13.61	S
54	A	Form 8949 exception; reported on Sch D Line 1a	33.00	36.08	BYPASS8949		-3.08	S
55	A	Form 8949 exception; reported on Sch D Line 1a	43.51	49.75	BYPASS8949		-6.24	S
56	A	Form 8949 exception; reported on Sch D Line 1a	67.10	74.78	BYPASS8949		-7.68	S
57	A	Form 8949 exception; reported on Sch D Line 1a	18.99	22.84	BYPASS8949		-3.85	S
58	A	Form 8949 exception; reported on Sch D Line 1a	49.73	56.32	BYPASS8949		-6.59	S
59	A	0.051665 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	1.97	2.98	W	1.01	0.00	S
60	A	Form 8949 exception; reported on Sch D Line 1a	23.00	26.30	BYPASS8949		-3.30	S
61	A	Form 8949 exception; reported on Sch D Line 1a	0.44	0.50	BYPASS8949		-0.06	S
62	A	Form 8949 exception; reported on Sch D Line 1a	121.28	137.41	BYPASS8949		-16.13	S
63	A	Form 8949 exception; reported on Sch D Line 1a	32.89	36.44	BYPASS8949		-3.55	S
64	A	Form 8949 exception; reported on Sch D Line 1a	31.61	37.05	BYPASS8949		-5.44	S
65	A	Form 8949 exception; reported on Sch D Line 1a	59.86	64.89	BYPASS8949		-5.03	S
66	A	Form 8949 exception; reported on Sch D Line 1a	26.17	29.25	BYPASS8949		-3.08	S
67	A	Form 8949 exception; reported on Sch D Line 1a	50.94	54.89	BYPASS8949		-3.95	S
68	A	Form 8949 exception; reported on Sch D Line 1a	27.68	30.05	BYPASS8949		-2.37	S
69	A	Form 8949 exception; reported on Sch D Line 1a	127.27	138.29	BYPASS8949		-11.02	S
70	A	Form 8949 exception; reported on Sch D Line 1a	34.02	36.17	BYPASS8949		-2.15	S
71	A	Form 8949 exception; reported on Sch D Line 1a	33.71	38.03	BYPASS8949		-4.32	S
72	A	Form 8949 exception; reported on Sch D Line 1a	3.83	4.21	BYPASS8949		-0.38	S
73	A	Form 8949 exception; reported on Sch D Line 1a	56.43	63.87	BYPASS8949		-7.44	S
74	A	Form 8949 exception; reported on Sch D Line 1a	21.86	25.04	BYPASS8949		-3.18	S
75	A	Form 8949 exception; reported on Sch D Line 1a	49.95	55.08	BYPASS8949		-5.13	S
76	A	0.055983 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	2.33	3.13	W	0.80	0.00	S
77	A	Form 8949 exception; reported on Sch D Line 1a	23.29	26.23	BYPASS8949		-2.94	S
78	A	Form 8949 exception; reported on Sch D Line 1a	126.60	141.60	BYPASS8949		-15.00	S
79	A	Form 8949 exception; reported on Sch D Line 1a	27.11	30.25	BYPASS8949		-3.14	S
80	A	Form 8949 exception; reported on Sch D Line 1a	43.36	48.50	BYPASS8949		-5.14	S
81	A	Form 8949 exception; reported on Sch D Line 1a	4.42	4.86	BYPASS8949		-0.44	S
82	A	Form 8949 exception; reported on Sch D Line 1a	3.62	4.04	BYPASS8949		-0.42	S
83	A	Form 8949 exception; reported on Sch D Line 1a	3.63	4.01	BYPASS8949		-0.38	S
84	A	Form 8949 exception; reported on Sch D Line 1a	49.12	57.50	BYPASS8949		-8.38	S
85	A	Form 8949 exception; reported on Sch D Line 1a	18.51	21.81	BYPASS8949		-3.30	S
86	A	Form 8949 exception; reported on Sch D Line 1a	49.57	54.79	BYPASS8949		-5.22	S
87	A	0.054301 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	2.25	2.93	W	0.68	0.00	S
88	A	Form 8949 exception; reported on Sch D Line 1a	0.76	0.89	BYPASS8949		-0.13	S
89	A	Form 8949 exception; reported on Sch D Line 1a	24.33	27.83	BYPASS8949		-3.50	S
90	A	0.005795 sh. Vanguard Mid-Cap Value ETF Class O	0.84	0.87	W	0.03	0.00	S
91	A	Form 8949 exception; reported on Sch D Line 1a	131.78	149.22	BYPASS8949		-17.44	S
92	A	Form 8949 exception; reported on Sch D Line 1a	35.71	40.08	BYPASS8949		-4.37	S
93	A	Form 8949 exception; reported on Sch D Line 1a	33.25	37.36	BYPASS8949		-4.11	S
94	A	Form 8949 exception; reported on Sch D Line 1a	3.85	4.51	BYPASS8949		-0.66	S
95	A	Form 8949 exception; reported on Sch D Line 1a	0.97	1.06	BYPASS8949		-0.09	S
96	A	0.043410 sh. Schwab U.S. REIT ETF Class O	1.10	1.14	W	0.04	0.00	S
97	A	Form 8949 exception; reported on Sch D Line 1a	0.44	0.52	BYPASS8949		-0.08	S
98	A	Form 8949 exception; reported on Sch D Line 1a	0.46	0.51	BYPASS8949		-0.05	S
99	A	0.006642 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	0.27	0.36	W	0.09	0.00	S
100	A	Form 8949 exception; reported on Sch D Line 1a	0.32	0.36	BYPASS8949		-0.04	S
101	A	Form 8949 exception; reported on Sch D Line 1a	2.43	2.74	BYPASS8949		-0.31	S
102	A	Form 8949 exception; reported on Sch D Line 1a	86.35	94.72	BYPASS8949		-8.37	S
103	A	Form 8949 exception; reported on Sch D Line 1a	17.47	20.31	BYPASS8949		-2.84	S
104	A	Form 8949 exception; reported on Sch D Line 1a	40.45	44.21	BYPASS8949		-3.76	S

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)
RQUICK **Continuation Statement**

105	A	Form 8949 exception; reported on Sch D Line 1a	18.61	21.19	BYPASS8949		-2.58	S
106	A	Form 8949 exception; reported on Sch D Line 1a	152.33	165.40	BYPASS8949		-13.07	S
107	A	Form 8949 exception; reported on Sch D Line 1a	21.33	24.01	BYPASS8949		-2.68	S
108	A	Form 8949 exception; reported on Sch D Line 1a	20.32	23.01	BYPASS8949		-2.69	S
109	A	Form 8949 exception; reported on Sch D Line 1a	1,426.49	1,489.36	BYPASS8949		-62.87	S
110	A	Form 8949 exception; reported on Sch D Line 1a	4.35	4.64	BYPASS8949		-0.29	S
111	A	Form 8949 exception; reported on Sch D Line 1a	1.13	1.20	BYPASS8949		-0.07	S
112	A	Form 8949 exception; reported on Sch D Line 1a	124.77	140.00	BYPASS8949		-15.23	S
113	A	Form 8949 exception; reported on Sch D Line 1a	65.58	71.35	BYPASS8949		-5.77	S
114	A	Form 8949 exception; reported on Sch D Line 1a	23.08	25.82	BYPASS8949		-2.74	S
115	A	Form 8949 exception; reported on Sch D Line 1a	49.76	53.48	BYPASS8949		-3.72	S
116	A	Form 8949 exception; reported on Sch D Line 1a	25.58	28.57	BYPASS8949		-2.99	S
117	A	Form 8949 exception; reported on Sch D Line 1a	31.82	35.47	BYPASS8949		-3.65	S
118	A	Form 8949 exception; reported on Sch D Line 1a	33.63	37.82	BYPASS8949		-4.19	S
119	A	Form 8949 exception; reported on Sch D Line 1a	139.74	153.66	BYPASS8949		-13.92	S
120	A	Form 8949 exception; reported on Sch D Line 1a	79.45	94.52	BYPASS8949		-15.07	S
121	A	Form 8949 exception; reported on Sch D Line 1a	13.03	14.85	BYPASS8949		-1.82	S
122	A	Form 8949 exception; reported on Sch D Line 1a	44.97	48.04	BYPASS8949		-3.07	S
123	A	Form 8949 exception; reported on Sch D Line 1a	20.22	22.63	BYPASS8949		-2.41	S
124	A	Form 8949 exception; reported on Sch D Line 1a	28.93	32.09	BYPASS8949		-3.16	S
125	A	Form 8949 exception; reported on Sch D Line 1a	23.92	27.27	BYPASS8949		-3.35	S
126	A	Form 8949 exception; reported on Sch D Line 1a	582.48	634.27	BYPASS8949		-51.79	S
127	A	Form 8949 exception; reported on Sch D Line 1a	73.93	81.47	BYPASS8949		-7.54	S
128	A	Form 8949 exception; reported on Sch D Line 1a	38.41	45.75	BYPASS8949		-7.34	S
129	A	Form 8949 exception; reported on Sch D Line 1a	18.08	20.28	BYPASS8949		-2.20	S
130	A	Form 8949 exception; reported on Sch D Line 1a	26.34	28.69	BYPASS8949		-2.35	S
131	A	Form 8949 exception; reported on Sch D Line 1a	114.33	132.46	BYPASS8949		-18.13	S
132	A	Form 8949 exception; reported on Sch D Line 1a	29.10	31.72	BYPASS8949		-2.62	S
133	A	Form 8949 exception; reported on Sch D Line 1a	47.01	49.83	BYPASS8949		-2.82	S
134	A	Form 8949 exception; reported on Sch D Line 1a	468.95	513.11	BYPASS8949		-44.16	S
135	A	Form 8949 exception; reported on Sch D Line 1a	51.34	56.25	BYPASS8949		-4.91	S
136	A	Form 8949 exception; reported on Sch D Line 1a	57.33	63.75	BYPASS8949		-6.42	S
137	A	Form 8949 exception; reported on Sch D Line 1a	42.58	45.55	BYPASS8949		-2.97	S
138	A	Form 8949 exception; reported on Sch D Line 1a	19.94	22.44	BYPASS8949		-2.50	S
139	A	Form 8949 exception; reported on Sch D Line 1a	19.90	21.98	BYPASS8949		-2.08	S
140	A	Form 8949 exception; reported on Sch D Line 1a	131.53	151.68	BYPASS8949		-20.15	S
141	A	Form 8949 exception; reported on Sch D Line 1a	26.64	29.35	BYPASS8949		-2.71	S
142	A	Form 8949 exception; reported on Sch D Line 1a	0.03	0.03	BYPASS8949		0.00	S
143	A	Form 8949 exception; reported on Sch D Line 1a	0.77	0.86	BYPASS8949		-0.09	S
144	A	Form 8949 exception; reported on Sch D Line 1a	6.32	7.24	BYPASS8949		-0.92	S
145	A	Form 8949 exception; reported on Sch D Line 1a	5.57	6.60	BYPASS8949		-1.03	S
146	A	Form 8949 exception; reported on Sch D Line 1a	22.73	26.90	BYPASS8949		-4.17	S
147	A	Form 8949 exception; reported on Sch D Line 1a	1.38	1.49	BYPASS8949		-0.11	S
148	A	Form 8949 exception; reported on Sch D Line 1a	1.18	1.28	BYPASS8949		-0.10	S
149	A	Form 8949 exception; reported on Sch D Line 1a	58.71	66.03	BYPASS8949		-7.32	S
150	A	Form 8949 exception; reported on Sch D Line 1a	24.19	27.66	BYPASS8949		-3.47	S
151	A	Form 8949 exception; reported on Sch D Line 1a	44.74	53.31	BYPASS8949		-8.57	S
152	A	Form 8949 exception; reported on Sch D Line 1a	32.88	37.21	BYPASS8949		-4.33	S
153	A	Form 8949 exception; reported on Sch D Line 1a	104.44	126.87	BYPASS8949		-22.43	S
154	A	Form 8949 exception; reported on Sch D Line 1a	45.23	50.83	BYPASS8949		-5.60	S
155	A	Form 8949 exception; reported on Sch D Line 1a	45.73	51.10	BYPASS8949		-5.37	S
156	A	Form 8949 exception; reported on Sch D Line 1a	16.92	19.06	BYPASS8949		-2.14	S
157	A	Form 8949 exception; reported on Sch D Line 1a	52.03	59.98	BYPASS8949		-7.95	S
158	A	Form 8949 exception; reported on Sch D Line 1a	13.61	15.40	BYPASS8949		-1.79	S

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

RQUICK **Continuation Statement**

159	A	Form 8949 exception; reported on Sch D Line 1a	145.69	170.37	BYPASS8949		-24.68	S
160	A	Form 8949 exception; reported on Sch D Line 1a	15.99	18.01	BYPASS8949		-2.02	S
161	A	0.048733 sh. Vanguard FTSE Emerging Markets Class O	2.02	2.20	W	0.18	0.00	S
162	A	Form 8949 exception; reported on Sch D Line 1a	1.83	2.17	BYPASS8949		-0.34	S
163	A	Form 8949 exception; reported on Sch D Line 1a	45.85	55.23	BYPASS8949		-9.38	S
164	A	Form 8949 exception; reported on Sch D Line 1a	67.43	71.44	BYPASS8949		-4.01	S
165	A	Form 8949 exception; reported on Sch D Line 1a	20.84	22.33	BYPASS8949		-1.49	S
166	A	Form 8949 exception; reported on Sch D Line 1a	0.32	0.34	BYPASS8949		-0.02	S
167	A	Form 8949 exception; reported on Sch D Line 1a	43.33	47.35	BYPASS8949		-4.02	S
168	A	Form 8949 exception; reported on Sch D Line 1a	24.03	25.89	BYPASS8949		-1.86	S
169	A	Form 8949 exception; reported on Sch D Line 1a	0.16	0.17	BYPASS8949		-0.01	S
170	A	Form 8949 exception; reported on Sch D Line 1a	1,546.87	1,674.93	BYPASS8949		-128.06	S
171	A	Form 8949 exception; reported on Sch D Line 1a	143.33	156.78	BYPASS8949		-13.45	S
172	A	Form 8949 exception; reported on Sch D Line 1a	33.39	35.73	BYPASS8949		-2.34	S
173	A	Form 8949 exception; reported on Sch D Line 1a	27.94	32.16	BYPASS8949		-4.22	S
174	A	Form 8949 exception; reported on Sch D Line 1a	677.37	712.15	BYPASS8949		-34.78	S
175	A	Form 8949 exception; reported on Sch D Line 1a	865.46	947.18	BYPASS8949		-81.72	S
176	A	Form 8949 exception; reported on Sch D Line 1a	10.40	11.38	BYPASS8949		-0.98	S
177	A	Form 8949 exception; reported on Sch D Line 1a	20.23	21.20	BYPASS8949		-0.97	S
178	A	Form 8949 exception; reported on Sch D Line 1a	37.41	39.96	BYPASS8949		-2.55	S
179	A	Form 8949 exception; reported on Sch D Line 1a	97.89	106.72	BYPASS8949		-8.83	S
180	A	Form 8949 exception; reported on Sch D Line 1a	16.78	17.89	BYPASS8949		-1.11	S
181	A	Form 8949 exception; reported on Sch D Line 1a	147.60	156.75	BYPASS8949		-9.15	S
182	A	Form 8949 exception; reported on Sch D Line 1a	15.52	16.57	BYPASS8949		-1.05	S
183	A	Form 8949 exception; reported on Sch D Line 1a	31.97	35.27	BYPASS8949		-3.30	S
184	A	Form 8949 exception; reported on Sch D Line 1a	15.98	17.41	BYPASS8949		-1.43	S
185	A	Form 8949 exception; reported on Sch D Line 1a	31.00	34.68	BYPASS8949		-3.68	S
186	A	Form 8949 exception; reported on Sch D Line 1a	91.10	100.28	BYPASS8949		-9.18	S
187	A	Form 8949 exception; reported on Sch D Line 1a	27.20	29.66	BYPASS8949		-2.46	S
188	A	Form 8949 exception; reported on Sch D Line 1a	131.51	143.35	BYPASS8949		-11.84	S
189	A	Form 8949 exception; reported on Sch D Line 1a	40.58	43.96	BYPASS8949		-3.38	S
190	A	Form 8949 exception; reported on Sch D Line 1a	18.55	21.61	BYPASS8949		-3.06	S
191	A	0.016970 sh. iShares Core S&P Total U.S. Stock Ma... Class O	1.41	1.42	W	0.01	0.00	S
192	A	Form 8949 exception; reported on Sch D Line 1a	1,008.06	1,065.68	BYPASS8949		-57.62	S
193	A	Form 8949 exception; reported on Sch D Line 1a	498.68	548.11	BYPASS8949		-49.43	S
194	A	Form 8949 exception; reported on Sch D Line 1a	18.50	20.30	BYPASS8949		-1.80	S
195	A	Form 8949 exception; reported on Sch D Line 1a	17.14	19.30	BYPASS8949		-2.16	S
196	A	Form 8949 exception; reported on Sch D Line 1a	38.17	40.87	BYPASS8949		-2.70	S
197	A	Form 8949 exception; reported on Sch D Line 1a	40.94	44.23	BYPASS8949		-3.29	S
198	A	Form 8949 exception; reported on Sch D Line 1a	83.06	89.69	BYPASS8949		-6.63	S
199	A	Form 8949 exception; reported on Sch D Line 1a	1.48	1.40	BYPASS8949		0.08	S
200	A	Form 8949 exception; reported on Sch D Line 1a	101.54	107.45	BYPASS8949		-5.91	S
201	A	Form 8949 exception; reported on Sch D Line 1a	52.26	56.65	BYPASS8949		-4.39	S
202	A	Form 8949 exception; reported on Sch D Line 1a	40.90	47.02	BYPASS8949		-6.12	S
203	A	Form 8949 exception; reported on Sch D Line 1a	50.36	52.60	BYPASS8949		-2.24	S
204	A	Form 8949 exception; reported on Sch D Line 1a	110.51	123.22	BYPASS8949		-12.71	S
205	A	Form 8949 exception; reported on Sch D Line 1a	72.79	78.92	BYPASS8949		-6.13	S
206	A	Form 8949 exception; reported on Sch D Line 1a	66.75	80.06	BYPASS8949		-13.31	S
207	A	Form 8949 exception; reported on Sch D Line 1a	77.58	82.46	BYPASS8949		-4.88	S
208	A	Form 8949 exception; reported on Sch D Line 1a	93.96	110.34	BYPASS8949		-16.38	S
209	A	Form 8949 exception; reported on Sch D Line 1a	38.50	43.45	BYPASS8949		-4.95	S
210	A	17.128109 sh. iShares Core MSCI EAFE ETF Class O	904.36	1,005.42	W	1.49	-99.57	S
211	A	Form 8949 exception; reported on Sch D Line 1a	12.59	13.97	BYPASS8949		-1.38	S
212	A	Form 8949 exception; reported on Sch D Line 1a	62.82	69.04	BYPASS8949		-6.22	S

Form 1099-B Worksheet (Betterment Securities) -- Capital Asset Sales Wksht (1)

RQUICK **Continuation Statement**

213	A	Form 8949 exception; reported on Sch D Line 1a	71.47	78.63	BYPASS8949		-7.16	S
214	A	Form 8949 exception; reported on Sch D Line 1a	139.98	152.67	BYPASS8949		-12.69	S
215	A	Form 8949 exception; reported on Sch D Line 1a	8.84	9.62	BYPASS8949		-0.78	S
216	A	Form 8949 exception; reported on Sch D Line 1a	34.51	37.31	BYPASS8949		-2.80	S
217	A	Form 8949 exception; reported on Sch D Line 1a	88.93	93.77	BYPASS8949		-4.84	S
218	A	Form 8949 exception; reported on Sch D Line 1a	139.64	147.95	BYPASS8949		-8.31	S
219	A	Form 8949 exception; reported on Sch D Line 1a	35.57	37.68	BYPASS8949		-2.11	S
220	A	0.025072 sh. Vanguard REIT Index ETF Class O	2.08	2.14	W	0.06	0.00	S

Electronic Filing Instructions for your 2022 California Tax Return

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

L CHEEDEPUDI & V YENUMULA
1928 Everglades Dr
Milpitas, CA 95035-6612

Balance Due/ Refund	Your California state tax return (Form 540) shows a refund due to you in the amount of $3,758.00. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 009514643274 Routing Transit Number: 011000138.
Where's My Refund?	Before you call the Franchise Tax Board with questions about your refund, give them 21 days processing time from the date your return is accepted. If then you have not received your refund, or the amount is not what you expected, contact the Franchise Tax Board directly at 1-800-338-0505. From outside of California use 1-916-845-6500. You can also visit the Franchise Tax Board web site at http://www.ftb.ca.gov/online/refund/.
What You Need to Sign	Sign and date Form 8453-OL within 1 day of acceptance. Since you are married filing jointly, your spouse must also sign and date the form.
Do Not Mail	Do not mail a paper copy of your tax return. Since you filed electronically, the Franchise Tax Board already has your return.
What You Need to Keep	Your Electronic Filing Instructions (this form) - Form 8453-OL and attachment(s) A copy of your state and federal returns

2022 California Tax Return Summary		
Taxable Income	$	248,934.00
Total Tax	$	15,512.00
Total Payments/Credits	$	19,270.00
Amount to be Refunded	$	3,758.00
Effective Tax Rate		5.66%

175
Date Accepted ____________________

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR **2022**

California Online e-file Return Authorization for Individuals

FORM **8453-OL**

Your first name and initial LEELA SESHU REDDY	Last name CHEEDEPUDI	Suffix	Your SSN or ITIN 024-88-7197
If filing jointly, spouse's/RDP's first name and initial VANI	Last name YENUMULA	Suffix	Spouse's/RDP's SSN or ITIN 382-35-7565
Street address (number and street) or PO box 1928 EVERGLADES DR	Apt. no./ste. no.	PMB/private mailbox	Daytime telephone number (408)657-3748
City MILPITAS		State CA	ZIP code 95035-6612
Foreign country name	Foreign province/state/county		Foreign postal code

Part I Tax Return Information (whole dollars only)

1 California adjusted gross income. See instructions . . . 1 273941
2 Refund or no amount due. See instructions . . . 2 3758
3 Amount you owe. See instructions . . . 3 ____

Part II Settle Your Account Electronically for Taxable Year 2022 (Pay by 4/18/2023)

4 ☒ Direct deposit of refund
5 ☐ Electronic funds withdrawal **5a** Amount ____ **5b** Withdrawal date (mm/dd/yyyy) ____

Part III Make Estimated Tax Payments for Taxable Year 2023 These are NOT installment payments for the current amount you owe.

	First Payment 4/18/2023	Second Payment 6/15/2023	Third Payment 9/15/2023	Fourth Payment 1/16/2024
6 Amount				
7 Withdrawal date				

Part IV Banking Information (Have you verified your banking information?)

8 Amount of refund to be directly deposited to account below 3758
9 Routing number 011000138
10 Account number 009514643274
11 Type of account: ☒ Checking ☐ Savings

12 The remaining amount of my refund for direct deposit ____
13 Routing number ____
14 Account number ____
15 Type of account: ☐ Checking ☐ Savings

Part V Declaration of Taxpayer(s)

I authorize my account to be settled as designated in Part II. If I check Part II, box 4, I declare that the direct deposit refund information in Part IV agrees with the authorization stated on my return. If I check Part II, box 5, I authorize an electronic funds withdrawal for the amount listed on line 5a and any estimated payment amounts listed on line 6 from the bank account listed on lines 9, 10, and 11. If I have filed a joint return, this is an irrevocable appointment of the other spouse/registered domestic partner (RDP) as an agent to receive the refund or authorize an electronic funds withdrawal.

Under penalties of perjury, I declare that the information I provided to the Franchise Tax Board (FTB), either directly or through e-file software, including my name, address, and social security number (SSN) or individual taxpayer identification number (ITIN), and the amounts shown in Part I above, agrees with the information and amounts shown on the corresponding lines of my 2022 California income tax return. To the best of my knowledge and belief, my return is true, correct, and complete. If I am filing a balance due return, I understand that if the FTB does not receive full and timely payment of my tax liability, I remain liable for the tax liability and all applicable interest and penalties. I authorize my return and accompanying schedules and statements to be transmitted to the FTB directly or through the e-file software. **If the processing of my return or refund is delayed, I authorize the FTB to disclose to me, either directly or through the e-file software, the reason(s) for the delay or the date when the refund was sent.**

Sign Here

Your signature ____ Date ____

Spouse's/RDP's signature. If filing jointly, both must sign. ____ Date ____
It is unlawful to forge a spouse's/RDP's signature.

TAXABLE YEAR

FORM

2022 California Resident Income Tax Return 540

APE ATTACH FEDERAL RETURN

024-88-7197 CHEE 382-35-7565 22
LEELASESHUR CHEEDEPUDI
VANI YENUMULA

1928 EVERGLADES DR
MILPITAS CA 95035-6612

12-11-1978 10-22-1982

Principal Residence

Enter your county at time of filing (see instructions)

SANTA CLARA

If your address above is the same as your principal/physical residence address at the time of filing, check this box . . . ☒

If not, enter below your principal/physical residence address at the time of filing.

Street address (number and street) (If foreign address, see instructions.) Apt. no/ste. no.

City State ZIP code

Filing Status

If your California filing status is different from your federal filing status, check the box here . . . . ☐

1 ☐ Single
2 ☒ Married/RDP filing jointly. See instr.
3 ☐ Married/RDP filing separately. Enter spouse's/RDP's SSN or ITIN above and full name here.
4 ☐ Head of household (with qualifying person). See instructions.
5 ☐ Qualifying surviving spouse/RDP. Enter year spouse/RDP died. See instructions.

6 If someone can claim you (or your spouse/RDP) as a dependent, check the box here. See instr. . . . . . . 6 ☐

Exemptions

▶ For line 7, line 8, line 9, and line 10: Multiply the number you enter in the box by the pre-printed dollar amount for that line.

Whole dollars only

7 **Personal:** If you checked box 1, 3, or 4 above, enter 1 in the box. If you checked box 2 or 5, enter 2 in the box. If you checked the box on line 6, see instructions.	7	2 X $140 = $	280
8 **Blind:** If you (or your spouse/RDP) are visually impaired, enter 1; if both are visually impaired, enter 2.	8	X $140 = $	
9 **Senior:** If you (or your spouse/RDP) are 65 or older, enter 1; if both are 65 or older, enter 2. See instructions.	9	X $140 = $	

REV 03/18/23 TTW

Your name: CHEEDEPUDI Your SSN or ITIN: 024-88-7197

10 Dependents: Do not include yourself or your spouse/RDP.

Exemptions

	Dependent 1	Dependent 2	Dependent 3
First Name	PRATEEK R	TARA R	
Last Name	CHEEDEPUDI	CHEEDEPUDI	
SSN. See instructions.	380355303	768477952	
Dependent's relationship to you	SON	DAUGHTER	

Total dependent exemptions . . . . 10 | 2 | X $433 = $ 866

11 **Exemption amount:** Add line 7 through line 10. Transfer this amount to line 32 . . . . . 11 $ 1146

Taxable Income

12	State wages from your federal Form(s) W-2, box 16 . . . . . 12 268854 .00		
13	Enter federal adjusted gross income from federal Form 1040 or 1040-SR, line 11	13	273941 .00
14	California adjustments – subtractions. Enter the amount from Schedule CA (540), Part I, line 27, column B	14	0 .00
15	Subtract line 14 from line 13. If less than zero, enter the result in parentheses. See instructions	15	273941 .00
16	California adjustments – additions. Enter the amount from Schedule CA (540), Part I, line 27, column C	16	.00
17	California adjusted gross income. Combine line 15 and line 16	17	273941 .00
18	Enter the **larger** of: Your California **itemized deductions** from Schedule CA (540), Part II, line 30; **OR** Your California **standard deduction** shown below for your filing status: • Single or Married/RDP filing separately. . . . . $5,202 • Married/RDP filing jointly, Head of household, or Qualifying surviving spouse/RDP. $10,404 If Married/RDP filing separately or the box on line 6 is checked, **STOP**. See instructions	18	25007 .00
19	Subtract line 18 from line 17. This is your **taxable income**. If less than zero, enter -0-	19	248934 .00

Tax

31	Tax. Check the box if from: ☐ Tax Table ☒ Tax Rate Schedule ☐ FTB 3800 ☐ FTB 3803	31	16658 .00
32	Exemption credits. Enter the amount from line 11. If your federal AGI is more than $229,908, see instructions.	32	1146 .00
33	Subtract line 32 from line 31. If less than zero, enter -0-	33	15512 .00
34	Tax. See instructions. Check the box if from: ☐ Schedule G-1 ☐ FTB 5870A . .	34	.00
35	Add line 33 and line 34	35	15512 .00

Special Credits

40	Nonrefundable Child and Dependent Care Expenses Credit. See instructions.	40	.00
43	Enter credit name ____ code ____ and amount. . .	43	.00
44	Enter credit name ____ code ____ and amount. . .	44	.00

REV 03/18/23 TTW

Your name: CHEEDEPUDI Your SSN or ITIN: 024-88-7197

Special Credits

45	To claim more than two credits. See instructions. Attach Schedule P (540)	45		.00
46	Nonrefundable Renter's Credit. See instructions	46		.00
47	Add line 40 through line 46. These are your total credits	47		.00
48	Subtract line 47 from line 35. If less than zero, enter -0-	48	15512	.00

Other Taxes

61	Alternative Minimum Tax. Attach Schedule P (540)	61	0	.00
62	Mental Health Services Tax. See instructions	62		.00
63	Other taxes and credit recapture. See instructions	63		.00
64	Add line 48, line 61, line 62, and line 63. This is your total tax.	64	15512	.00

Payments

71	California income tax withheld. See instructions	71	19270	.00
72	2022 California estimated tax and other payments. See instructions	72		.00
73	Withholding (Form 592-B and/or Form 593). See instructions.	73		.00
74	Excess SDI (or VPDI) withheld. See instructions	74		.00
75	Earned Income Tax Credit (EITC). See instructions	75		.00
76	Young Child Tax Credit (YCTC). See instructions	76		.00
77	Foster Youth Tax Credit (FYTC). See instructions	77		.00
78	Add line 71 through line 77. These are your total payments. See instructions	78	19270	.00

Use Tax

91 **Use Tax.** Do not leave blank. See instructions 91 0 .00

If line 91 is zero, check if: [X] No use tax is owed. [ ] You paid your use tax obligation directly to CDTFA.

ISR Penalty

92 If you and your household had full-year health care coverage, check the box. See instructions. Medicare Part A or C coverage is qualifying health care coverage. [X]
If you did not check the box, see instructions.

Individual Shared Responsibility (ISR) Penalty. See instructions 92 .00

Overpaid Tax/Tax Due

93	Payments balance. If line 78 is more than line 91, subtract line 91 from line 78	93	19270	.00
94	**Use Tax balance.** If line 91 is more than line 78, subtract line 78 from line 91	94		.00
95	Payments after Individual Shared Responsibility Penalty. If line 93 is more than line 92, subtract line 92 from line 93.	95	19270	.00
96	Individual Shared Responsibility Penalty Balance. If line 92 is more than line 93, subtract line 93 from line 92.	96		.00
97	Overpaid tax. If line 95 is more than line 64, subtract line 64 from line 95.	97	3758	.00

REV 03/18/23 TTW

Your name: CHEEDEPUDI Your SSN or ITIN: 024-88-7197

Overpaid Tax/Tax Due

98	Amount of line 97 you want applied to your **2023** estimated tax	98	.00
99	Overpaid tax available this year. Subtract line 98 from line 97	99	3758 .00
100	Tax due. If line 95 is less than line 64, subtract line 95 from line 64	100	.00

Contributions

		Code	**Amount**
	California Seniors Special Fund. See instructions	400	.00
	Alzheimer's Disease and Related Dementia Voluntary Tax Contribution Fund	401	.00
	Rare and Endangered Species Preservation Voluntary Tax Contribution Program	403	.00
	California Breast Cancer Research Voluntary Tax Contribution Fund.	405	.00
	California Firefighters' Memorial Voluntary Tax Contribution Fund	406	.00
	Emergency Food for Families Voluntary Tax Contribution Fund	407	.00
	California Peace Officer Memorial Foundation Voluntary Tax Contribution Fund.	408	.00
	California Sea Otter Voluntary Tax Contribution Fund	410	.00
	California Cancer Research Voluntary Tax Contribution Fund	413	.00
	School Supplies for Homeless Children Voluntary Tax Contribution Fund	422	.00
	State Parks Protection Fund/Parks Pass Purchase	423	.00
	Protect Our Coast and Oceans Voluntary Tax Contribution Fund.	424	.00
	Keep Arts in Schools Voluntary Tax Contribution Fund	425	.00
	Prevention of Animal Homelessness and Cruelty Voluntary Tax Contribution Fund	431	.00
	California Senior Citizen Advocacy Voluntary Tax Contribution Fund	438	.00
	Native California Wildlife Rehabilitation Voluntary Tax Contribution Fund.	439	.00
	Rape Kit Backlog Voluntary Tax Contribution Fund	440	.00
	Suicide Prevention Voluntary Tax Contribution Fund	444	.00
	Mental Health Crisis Prevention Voluntary Tax Contribution Fund.	445	.00
	California Community and Neighborhood Tree Voluntary Tax Contribution Fund	446	.00
110	Add amounts in code 400 through code 446. This is your total contribution	110	.00

Amount You Owe

111 **AMOUNT YOU OWE.** If you do not have an amount on line 99, add line 94, line 96, line 100, and line 110. See instructions. **Do not send cash.**
Mail to: **FRANCHISE TAX BOARD, PO BOX 942867, SACRAMENTO CA 94267-0001** . . . . . 111 .00
Pay Online – Go to **ftb.ca.gov/pay** for more information.

REV 03/18/23 TTW

Your name: CHEEDEPUDI Your SSN or ITIN: 024-88-7197

Interest and Penalties

112 Interest, late return penalties, and late payment penalties . . . . 112 .00

113 Underpayment of estimated tax.

Check the box: ● ☐ **FTB 5805 attached** ● ☐ **FTB 5805F attached** . . . . ● 113 .00

114 Total amount due. See instructions. Enclose, but **do not** staple, any payment . . . . 114 .00

Refund and Direct Deposit

115 **REFUND OR NO AMOUNT DUE.** Subtract the sum of line 110, line 112, and line 113 from line 99. See instructions.

Mail to: **FRANCHISE TAX BOARD, PO BOX 942840, SACRAMENTO CA 94240-0001**. . . . . . ● 115 3758 .00

Fill in the information to authorize direct deposit of your refund into one or two accounts. **Do not** attach a voided check or a deposit slip. See instructions. **Have you verified the routing and account numbers?** Use whole dollars only.

All or the following amount of my refund (line 115) is authorized for direct deposit into the account shown below:

● Routing number: 011000138

● Type: ☒ Checking ☐ Savings

● Account number: 009514643274

● **116** Direct deposit amount: 3758 .00

The remaining amount of my refund (line 115) is authorized for direct deposit into the account shown below:

● Routing number:

● Type: ☐ Checking ☐ Savings

● Account number:

● **117** Direct deposit amount: .00

Voter Info.

For voter registration information, check the box and go to **sos.ca.gov/elections**. See instructions . . . . ☐

IMPORTANT: See the instructions to find out if you should attach a copy of your complete federal tax return.

Our privacy notice can be found in annual tax booklets or online. Go to **ftb.ca.gov/privacy** to learn about our privacy policy statement, or go to **ftb.ca.gov/forms** and search for **1131** to locate FTB 1131 EN-SP, Franchise Tax Board Privacy Notice on Collection. To request this notice by mail, call 800.338.0505 and enter form code **948** when instructed.

Under penalties of perjury, I declare that I have examined this tax return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Your signature

Date

Spouse's/RDP's signature (if a joint tax return, both must sign)

Sign Here

It is unlawful to forge a spouse's/RDP's signature.

Joint tax return? See instructions.

◉ Your email address. Enter only one email address.

◉ Preferred phone number: 4086573748

Paid preparer's signature **(declaration of preparer is based on all information of which preparer has any knowledge)**

Firm's name (or yours, if self-employed): SELF PREPARED

● PTIN

Firm's address

● Firm's FEIN

Do you want to allow another person to discuss this tax return with us? See instructions. . . . . . . ● ☐ Yes ☒ No

Print Third Party Designee's Name

Telephone Number

REV 03/18/23 TTW

TAXABLE YEAR **2022**

California Adjustments — Residents

SCHEDULE **CA (540)**

Important: Attach this schedule behind Form 540, Side 5 as a supporting California schedule.

Name(s) as shown on tax return	SSN or ITIN
L CHEEDEPUDI & V YENUMULA	024887197

Part I Income Adjustment Schedule

Section A – Income from federal Form 1040 or 1040-SR		**A** Federal Amounts (taxable amounts from your federal tax return)	**B** Subtractions See instructions	**C** Additions See instructions
1 a Total amount from federal Form(s) W-2, box 1. See instructions	1a	268854		
b Household employee wages not reported on federal Form(s) W-2	1b			
c Tip income not reported on line 1a	1c			
d Medicaid waiver payments not reported on federal Form(s) W-2. See instructions	1d			
e Taxable dependent care benefits from federal Form 2441, line 26	1e			
f Employer-provided adoption benefits from federal Form 8839, line 29	1f			
g Wages from federal Form 8919, line 6	1g			
h Other earned income. See instructions	1h	0		
i Nontaxable combat pay election. See instructions	1i			
z Add line 1a through line 1i	1z	268854		
2 Taxable interest. a 93	2b	268		
3 Ordinary dividends. See instructions. a 3309	3b	4019		
4 IRA distributions. See instructions. a	4b			
5 Pensions and annuities. See instructions. a	5b			
6 Social security benefits. a	6b			
7 Capital gain or (loss). See instructions	7	-3000		

Section B – Additional Income from federal Schedule 1 (Form 1040)		A	B	C
1 Taxable refunds, credits, or offsets of state and local income taxes	1	0	0	
2 a Alimony received. See instructions.	2a			
3 Business income or (loss). See instructions.	3			
4 Other gains or (losses)	4			
5 Rental real estate, royalties, partnerships, S corporations, trusts, etc.	5			
6 Farm income or (loss)	6			
7 Unemployment compensation	7			

REV 03/18/23 TTW

Section B – Additional Income Continued		A Federal Amounts (taxable amounts from your federal tax return)	B Subtractions See instructions	C Additions See instructions
8 Other income: a Federal net operating loss	8a	( )		
b Gambling	8b			
c Cancellation of debt	8c			
d Foreign earned income exclusion from federal Form 2555	8d	( )		
e Income from federal Form 8853	8e			
f Income from federal Form 8889	8f			
g Alaska Permanent Fund dividends	8g			
h Jury duty pay	8h			
i Prizes and awards	8i			
j Activity not engaged in for profit income	8j			
k Stock options	8k			
l 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	8l			
m Olympic and Paralympic medals and USOC prize money	8m			
n IRC Section 951(a) inclusion	8n			
o IRC Section 951A(a) inclusion	8o			
p IRC Section 461(l) excess business loss adjustment	8p			
q Taxable distributions from an ABLE account	8q			
r Scholarship and fellowship grants not reported on federal Form(s) W-2	8r			
s Nontaxable amount of Medicaid waiver payments included on federal Form 1040, line 1a or line 1d	8s	( )		
t Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental IRC Section 457 plan	8t			
u Wages earned while incarcerated	8u			
z Other income. List type and amount. OTHER INCOME FROM BOX 3 OF 1099-MISC	8z	3800		

REV 03/18/23 TTW

Section B – Additional Income Continued		A Federal Amounts (taxable amounts from your federal tax return)	B Subtractions See instructions	C Additions See instructions
9 a Total other income. Add lines 8a through 8z.	9a	3800		
b1 Disaster loss deduction from form FTB 3805V	9b1			
b2 NOL deduction from form FTB 3805V	9b2			
b3 NOL from form FTB 3805Z, 3807, or 3809	9b3			
10 **Total.** Combine Section A, line 1z through line 7, and Section B, line 1 through line 7, and line 9a in column A and column C. Add Section A, line 1z through line 7, and Section B, line 1 through line 7, line 9a, and line 9b1 through line 9b3 in column B (as applicable). See instructions.	10	273941	0	

Section C – Adjustments to Income from federal Schedule 1 (Form 1040)		A	B	C
11 Educator expenses	11			
12 Certain business expenses of reservists, performing artists, and fee-basis government officials	12			
13 Health savings account deduction	13			
14 Moving expenses. Attach form FTB 3913. See instructions	14			
15 Deductible part of self-employment tax. See instructions.	15			
16 Self-employed SEP, SIMPLE, and qualified plans	16			
17 Self-employed health insurance deduction. See instructions.	17			
18 Penalty on early withdrawal of savings	18			
19 a Alimony paid.	19a			
b Recipient's: SSN ______ Last Name ______				
20 IRA deduction	20			
21 Student loan interest deduction	21			
22 Reserved for future use	22			
23 Archer MSA deduction	23			

REV 03/18/23 TTW

Section C – Adjustments to Income Continued	**A** Federal Amounts (taxable amounts from your federal tax return)	**B** Subtractions See instructions	**C** Additions See instructions
24 Other adjustments:			
a Jury duty pay **24a**			
b Deductible expenses related to income reported on line 8l from the rental of personal property engaged in for profit. **24b**			
c Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8m **24c**			
d Reforestation amortization and expenses. **24d**			
e Repayment of supplemental unemployment benefits under the federal Trade Act of 1974 . . . . **24e**			
f Contributions to IRC Section 501(c)(18)(D) pension plans **24f**			
g Contributions by certain chaplains to IRC Section 403(b) plans **24g**			
h Attorney fees and court costs for actions involving certain unlawful discrimination claims **24h**			
i Attorney fees and court costs you paid in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations. **24i**			
j Housing deduction from federal Form 2555 . . . . . **24j**			
k Excess deductions of IRC Section 67(e) expenses from federal Schedule K-1 (Form 1041) **24k**			
z Other adjustments. List type and amount. ______ **24z**			
25 Total other adjustments. Add line 24a through line 24z **25**			
26 Add line 11 through line 23 and line 25 in columns A, B, and C. See instructions **26**			
27 **Total.** Subtract line 26 from line 10 in columns A, B, and C. See instructions **27**	273941	0	

REV 03/18/23 TTW

Part II Adjustments to Federal Itemized Deductions

Check the box if you did NOT itemize for federal but will itemize for California . . . . ☒

	A Federal Amounts (from federal Schedule A (Form 1040))	B Subtractions See instructions	C Additions See instructions
Medical and Dental Expenses See instructions.			
1 Medical and dental expenses . . . . ______ 1			
2 Enter amount from federal Form 1040 or 1040-SR, line 11. . 273941 2			
3 Multiply line 2 by 7.5% (0.075) 20546 3			
4 Subtract line 3 from line 1. If line 3 is more than line 1, enter 0 4			
Taxes You Paid			
5 a State and local income tax or general sales taxes. . 5a	21957	21957	
b State and local real estate taxes 5b	9989		
c State and local personal property taxes 5c	166		
d Add line 5a through line 5c. 5d	32112		
e Enter the smaller of line 5d or $10,000 ($5,000 if married filing separately) in column A. Enter the amount from line 5a, column B in line 5e, column B. Enter the difference from line 5d and line 5e, column A in line 5e, column C 5e	10000	21957	22112
6 Other taxes. List type ______ 6			
7 Add line 5e and line 6. 7	10000	21957	22112
Interest You Paid			
8 a Home mortgage interest and points reported to you on federal Form 1098 . . . . 8a	14153		
b Home mortgage interest not reported to you on federal Form 1098. . . . . 8b			
c Points not reported to you on federal Form 1098. . 8c			
d Reserved for future use 8d			
e Add line 8a through line 8c. 8e	14153		
9 Investment interest. 9			
10 Add line 8e and line 9. 10	14153		

REV 03/18/23 TTW

Part II Adjustments to Federal Itemized Deductions Continued	**A** Federal Amounts (from federal Schedule A (Form 1040))	**B** Subtractions See instructions	**C** Additions See instructions
Gifts to Charity			
11 Gifts by cash or check **11**	199		
12 Other than by cash or check **12**	500		
13 Carryover from prior year **13**			
14 Add line 11 through line 13 . . . . **14**	699		
Casualty and Theft Losses			
15 Casualty or theft loss(es) (other than net qualified disaster losses). Attach federal Form 4684. See instructions . . **15**			
Other Itemized Deductions			
16 Other—from list in federal instructions. **16**			
17 Add lines 4, 7, 10, 14, 15, and 16 in columns A, B, and C **17**	24852	21957	22112

18 **Total.** Combine line 17 column A less column B plus column C **18** 25007

Job Expenses and Certain Miscellaneous Deductions

19 Unreimbursed employee expenses: job travel, union dues, job education, etc. Attach federal Form 2106 if required. See instructions **19**

20 Tax preparation fees **20**

21 Other expenses: investment, safe deposit box, etc. List type **21** 0

22 Add line 19 through line 21 . . . . **22** 0

23 Enter amount from federal Form 1040 or 1040-SR, line 11 273941

24 Multiply line 23 by 2% (0.02). If less than zero, enter 0 . . . . **24** 5479

25 Subtract line 24 from line 22. If line 24 is more than line 22, enter 0 . . . . **25** 0

26 **Total Itemized Deductions.** Add line 18 and line 25 . . . . **26** 25007

27 Other adjustments. See instructions. Specify. **27**

28 Combine line 26 and line 27 . . . . **28** 25007

29 **Is your federal AGI (Form 540, line 13) more than the amount shown below for your filing status?**

Single or married/RDP filing separately **$229,908**
Head of household **$344,867**
Married/RDP filing jointly or qualifying surviving spouse/RDP **$459,821**

No. Transfer the amount on line 28 to line 29.

Yes. Complete the Itemized Deductions Worksheet in the instructions for Schedule CA (540), line 29 . . . . **29** 25007

30 **Enter the larger of the amount on line 29 or your standard deduction listed below:**

Single or married/RDP filing separately. See instructions **$5,202**
Married/RDP filing jointly, head of household, or qualifying surviving spouse/RDP . . **$10,404**

Transfer the amount on line 30 to Form 540, line 18 . . . . **30** 25007

REV 03/18/23 TTW

TAXABLE YEAR **2022**

California Capital Gain or Loss Adjustment

Do not complete this schedule if all of your California gains (losses) are the same as your federal gains (losses).

SCHEDULE **D (540)**

Name(s) as shown on return: L CHEEDEPUDI & V YENUMULA

SSN or ITIN: 024887197

1	(a) Description of property Example: 100 shares of "Z" Co.	(b) Sales price	(c) Cost or other basis	(d) Loss If (c) is more than (b), subtract (b) from (c)	(e) Gain If (b) is more than (c), subtract (c) from (b)
a	1099-B BYPASSING 8949	15704	17149	1445	
b	1099-B BYPASSING 8949	13	17	4	
c	61.00 SCHWAB US SMALL CAP ETF	5649	6155	506	
d	102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	3587	3937	350	
e	76.00 ISHARES CORE MSCI EMERGING ETF	4223	4604	381	
f	184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5423	5821	398	
g	134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	4071	4524	453	
h	70.00 SCHWAB INTERNATIONAL EQUITY ETF	2415	2787	372	
i	43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	1506	1805	299	
j	23.00 ISHARES CALIFORNIA MUNI BOND ETF	1309	1440	131	
k	257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	4953	5423	470	
l	191.00 SCHWAB EMERGING MARKETS EQUITY ETF	4927	5365	438	
m	18.00 VANGUARD SMALL CAP ETF	3532	3715	183	
n	94.00 SCHWAB US LARGE CAP ETF	4695	4791	96	
o	117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	3693	4005	312	
p	29.00 XTRACKERS INTER REAL ESTETF	678	842	164	
q	107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	5180	5484	304	
r	225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5901	6137	236	
s	126.00 ISHARES CORE MSCI EMERGING ETF	6168	6491	323	
t	135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	7052	7523	471	
u	11.00 VANGUARD SMALL CAP ETF	1884	2271	387	
v	SEE LINE 1A STATEMENT	139332	147735	8548	145
2	Net gain or (loss) shown on California Schedule(s) K-1 (100S, 541, 565, and 568) 2				

3 Capital gain distributions (federal Form 1099-DIV, box 2a) . . . . 3 — 236

4 Total 2022 gains from all sources. Add column (e) amounts of line 1, line 2, and line 3 . . . . 4 — 381

5 2022 loss. Add column (d) amounts of line 1 and line 2. . . . . 5 (16271)

6 California capital loss carryover from 2021, if any. See instructions. 6 (0)

7 Total 2022 loss. Add line 5 and line 6 . . . . 7 (16271)

REV 03/18/23 TTW

8	Net gain or (loss). Combine line 4 and line 7. If a loss, go to line 9. If a gain, go to line 10	**8**	-15890
9	If line 8 is a loss, enter the smaller of: **a** the loss on line 8.		
	b $3,000 ($1,500 if married/RDP filing separate). See instructions	**9**	(-3000)
10	Enter the gain or (loss) from federal Form 1040 or 1040-SR, line 7	**10**	-3000
11	Enter the California gain from line 8 or (loss) from line 9	**11**	-3000
12	**a** If line 10 is **more** than line 11, enter the difference here and on Schedule CA (540), Part I, Section A, line 7, column B	**12a**	
	b If line 10 is **less** than line 11, enter the difference here and on Schedule CA (540), Part I, Section A, line 7, column C	**12b**	0

REV 03/18/23 TTW

Additional Information From Schedule D (540): California Capital Gain or Loss Adjustment

Schedule D (540): California Capital Gain or Loss Adjustment

Gain/Loss Adjustment **Continuation Statement**

Property Description	Sales Price	Cost or Other Basis	Loss	Gain
123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	5015	5341	326	
130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	3978	4278	300	
62.00 VANGUARD FTSE DEVELOPED MARKETS ETF	2489	2804	315	
20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF	1989	2316	327	
44.00 INVESCO FTSE RAFI US 1500 SMALL-MID	6851	7133	282	
245.00 SCHWAB EMERGING MARKETS EQUITY ETF	5935	6157	222	
355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	6100	6613	513	
177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	4811	5095	284	
44.00 VANGUARD GLBAL EX US REAL ESTATE ETF	1819	2018	199	
135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	3661	3957	296	
181.00 ISHARES CORE MSCI EMERGING ETF	8051	8502	451	
63.00 INVESCO FTSE RAFI US 1000 ETF	8964	9526	562	
167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	3904	4219	315	
153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	6605	6993	388	
172.00 SCHWAB INTERNATIONAL EQUITY ETF	4924	5385	461	
89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	2430	2775	345	
248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5808	6094	286	
145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	5097	5502	405	
349.00 SCHWAB EMERGING MARKETS EQUITY ETF	7517	8043	526	
211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	5816	6052	236	
WARNER BROS DISCOVERY INC COM SE 0.004	0	0		0
WARNER BROS DISCOVERY INC COM SE 0.018	0	1	1	
4.539722 SH. SCHWAB U.S. REIT ETF CLASS O	102	107	5	
1.177394 SH. VANGUARD FTSE EMERGING MARKETS CLASS O	52	58	6	
0.003339 SH. VANGUARD FTSE EMERGING MARKETS CLASS O	0	0		0
0.002187 SH. VANGUARD FTSE EMERGING MARKETS CLASS O	0	0		0
0.010515 SH. VANGUARD FTSE EMERGING MARKETS CLASS O	1	1		0
0.051665 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O	2	2		0
0.055983 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O	2	2		0

Schedule D (540): California Capital Gain or Loss Adjustment

Gain/Loss Adjustment

Continuation Statement

Property Description	Sales Price	Cost or Other Basis	Loss	Gain
0.054301 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O	2	2		0
0.005795 SH. VANGUARD MID-CAP VALUE ETF CLASS O	1	1		0
0.043410 SH. SCHWAB U.S. REIT ETF CLASS O	1	1		0
0.006642 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O	0	0		0
0.048733 SH. VANGUARD FTSE EMERGING MARKETS CLASS O	2	2		0
0.016970 SH. ISHARES CORE S&P TOTAL U.S. STOCK MA... CLASS O	1	1		0
17.128109 SH. ISHARES CORE MSCI EAFE ETF CLASS O	904	1004	100	
0.025072 SH. VANGUARD REIT INDEX ETF CLASS O	2	2		0
4.00 SCHWAB US SMALL CAP ETF	370	370		0
12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	422	429	7	
12.00 SCHWAB INTERNATIONAL EQUITY ETF	414	448	34	
42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	1276	1318	42	
25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	876	967	91	
48.00 ISHARES CALIFORNIA MUNI BOND ETF	2732	2959	227	
37.00 SCHWAB EMERGING MARKETS EQUITY ETF	954	1015	61	
50.00 SCHWAB US LARGE CAP ETF	2498	2355		143
46.00 XTRACKERS INTER REAL ESTETF	1076	1278	202	
43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	2082	2252	170	
27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	708	775	67	
40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	2090	2186	96	
57.00 VANGUARD FTSE DEVELOPED MARKETS ETF	2289	2307	18	
106.00 SCHWAB EMERGING MARKETS EQUITY ETF	2568	2640	72	
8.00 VANGUARD GLBAL EX US REAL ESTATE ETF	331	447	116	
83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	2251	2263	12	
1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	23	28	5	
7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	302	316	14	
48.00 SCHWAB INTERNATIONAL EQUITY ETF	1374	1433	59	
1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	27	29	2	
229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	5363	5391	28	
155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	5449	5447		2
12.00 SCHWAB EMERGING MARKETS EQUITY ETF	258	271	13	
27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	744	799	55	
WARNER BROS DISCOVERY INC COM SE 0.3	8	8		0
WARNER BROS DISCOVERY INC COM SE 0.018	0	1	1	

Schedule D (540): California Capital Gain or Loss Adjustment

Gain/Loss Adjustment — Continuation Statement

Property Description	Sales Price	Cost or Other Basis	Loss	Gain
WARNER BROS DISCOVERY INC COM SE 0.024	1	1		0
WARNER BROS DISCOVERY INC COM SE 0.018	0	1	1	
0.258829 SH. VANGUARD FTSE EMERGING MARKETS CLASS O	10	14	4	
Total	139332	147735	8548	145

TAXABLE YEAR **2022**

Alternative Minimum Tax and Credit Limitations — Residents

CALIFORNIA SCHEDULE **P (540)**

Attach this schedule to Form 540.

Name(s) as shown on Form 540	Your SSN or ITIN
L CHEEDEPUDI & V YENUMULA	024887197

Part I Alternative Minimum Taxable Income (AMTI) Important: See instructions for information regarding California/federal differences.

1	If you itemized deductions, go to line 2. If you did not itemize deductions, enter your standard deduction from Form 540, line 18, and go to line 6	1	00
2	Medical and dental expenses. Enter the smaller of federal Schedule A (Form 1040), line 4, or 2½% (.025) of federal Form 1040 or 1040-SR, line 11. See instructions	2	0 00
3	Personal property taxes and real property taxes. See instructions	3	10155 00
4	Certain interest on a home mortgage not used to buy, build, or improve your home. See instructions	4	00
5	Miscellaneous itemized deductions. See instructions	5	0 00
6	Refund of personal property taxes and real property taxes. See instructions. **Do not** include your state income tax refund on this line.	6	(0 00)
7	Investment interest expense adjustment. See instructions	7	0 00
8	Post-1986 depreciation. See instructions	8	00
9	Adjusted gain or loss. See instructions	9	00
10	Incentive stock options (ISOs) and California qualified stock options (CQSOs). See instructions	10	18675 00
11	Passive activities adjustment. See instructions	11	00
12	Beneficiaries of estates and trusts. Enter the amount from Schedule K-1 (541), line 12a	12	00

13 Other adjustments and preferences. Enter the amount, if any, for each item, a through l. See instructions.

a	Circulation expenditures	00	g	Mining costs	00
b	Depletion	00	h	Patron's adjustment	00
c	Installment sales	00	i	Pollution control facilities	00
d	Intangible drilling costs	00	j	Research and experimental	00
e	Long-term contracts	00	k	Tax shelter farm activities	00
f	Loss limitations	00	l	Related adjustments	00

	Add amounts on line a through line l, and enter total here	13	00
14	Total Adjustments and Preferences. Combine line 1 through line 13	14	28830 00
15	Enter taxable income from Form 540, line 19. See instructions	15	248934 00
16	Net operating loss (NOL) deductions from Schedule CA (540), Part I, Section B, line 9b1, line 9b2, and line 9b3, column B. Enter as a positive amount	16	00
17	AMTI exclusion. See instructions	17	(00)
18	If your federal adjusted gross income (AGI) is less than the amount for your filing status (listed below), skip this line and go to line 19. If you itemized deductions and your federal AGI is more than the amount for your filing status, see instructions. Single or married/RDP filing separately $229,908; Married/RDP filing jointly or qualifying surviving spouse/RDP $459,821; Head of household $344,867	18	(00)
19	Combine line 14 through line 18	19	277764 00
20	Alternative minimum tax NOL deduction. See instructions	20	00
21	**Alternative Minimum Taxable Income.** Subtract line 20 from line 19 (if married/RDP filing separately and line 21 is more than $436,827, see instructions)	21	277764 00

Part II Alternative Minimum Tax (AMT)

22 **Exemption Amount.** (If this schedule is for a certain child under age 24, see instructions.)

If your filing status is:	And line 21 is not over:	Enter on line 22:
Single or head of household	$317,062	$84,550
Married/RDP filing jointly or qualifying surviving spouse/RDP	$422,750	$112,734
Married/RDP filing separately	$211,371	$56,364

If Part I, line 21 is more than the amount shown above for your filing status, see instructions. — 22: 112734 00

23	Subtract line 22 from line 21. If zero or less, enter -0-. See instructions	23	165030 00
24	Tentative Minimum Tax. Multiply line 23 by 7.0% (.07)	24	11552 00
25	Regular tax before credits from Form 540, line 31	25	16658 00
26	**Alternative Minimum Tax.** Subtract line 25 from line 24. If zero or less, enter -0- here and on Form 540, line 61. If more than zero, enter here and on Form 540, line 61. If you make estimated tax payments for taxable year 2023, enter amount from line 26 on the 2023 Form 540-ES, California Estimated Tax Worksheet, line 16. (Exception: If you have carryover credit for solar energy or commercial solar energy, first enter the result on Side 2, Part III, Section C, line 23 or 24)	26	0 00

REV 03/18/23 TTW

Part III **Credits that Reduce Tax** **Note:** Be sure to attach your credit forms to Form 540.

1	Enter the amount from Form 540, line 35	1	15512 00
2	Enter the tentative minimum tax from Side 1, Part II, line 24	2	11552 00

	Line	(a) Credit amount	(b) Credit used this year	(c) Tax balance that may be offset by credits	(d) Credit carryover
Section A – Credits that reduce excess tax.					
3 Subtract line 2 from line 1. If zero or less enter -0- and see instructions. This is your excess tax which may be offset by credits	3			3960	
A1 Credits that reduce excess tax and have no carryover provisions.					
4 Code: 162 Prison inmate labor credit (FTB 3507)	4				
5 Code: 232 Child and dependent care expenses credit (FTB 3506)	5				
A2 Credits that reduce excess tax and have carryover provisions. See instructions.					
6 Code: ____ ____ ____ Credit Name: ____	6				
7 Code: ____ ____ ____ Credit Name: ____	7				
8 Code: ____ ____ ____ Credit Name: ____	8				
9 Code: ____ ____ ____ Credit Name: ____	9				
10 Code: 188 Credit for prior year alternative minimum tax	10			3960	
Section B – Credits that may reduce tax below tentative minimum tax.					
11 If Part III, line 3 is zero, enter the amount from line 1. If line 3 is more than zero, enter the total of line 2 and the last entry in column (c)	11			15512	
B1 Credits that reduce net tax and have no carryover provisions.					
12 Code: 170 Credit for joint custody head of household	12				
13 Code: 173 Credit for dependent parent	13				
14 Code: 163 Credit for senior head of household	14				
15 Nonrefundable renter's credit	15				
B2 Credits that reduce net tax and have carryover provisions. See instructions.					
16 Code: ____ ____ ____ Credit Name: ____	16				
17 Code: ____ ____ ____ Credit Name: ____	17				
18 Code: ____ ____ ____ Credit Name: ____	18				
19 Code: ____ ____ ____ Credit Name: ____	19				
B3 Other state tax credit.					
20 Code: 187 Other state tax credit	20			15512	
B4 Pass-through entity elective tax credit. See instructions.					
21 Code: 242 Pass-through entity elective tax credit	21				
Section C – Credits that may reduce alternative minimum tax.					
22 Enter your alternative minimum tax from Side 1, Part II, line 26	22			0	
23 Code: 180 Solar energy credit carryover from Section B2, column (d)	23				
24 Code: 181 Commercial solar energy credit carryover from Section B2, column (d)	24				
25 Adjusted AMT. Enter the balance from line 24, column (c) here and on Form 540, line 61	25			0	

REV 03/18/23 TTW

SCHEDULE A (Form 1040)

Department of the Treasury
Internal Revenue Service

Itemized Deductions

Go to *www.irs.gov/ScheduleA* for instructions and the latest information.
Attach to Form 1040 or 1040-SR.
Caution: If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

OMB No. 1545-0074
2022
Attachment Sequence No. **07**

Name(s) shown on Form 1040 or 1040-SR: L CHEEDEPUDI & V YENUMULA

Your social security number: 024-88-7197

Medical and Dental Expenses		**Caution:** Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1			
	2	Enter amount from Form 1040 or 1040-SR, line 11 — 2: 273941				
	3	Multiply line 2 by 7.5% (0.075)	3	20546		
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	0
Taxes You Paid	5	State and local taxes.				
	a	State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box ☐	5a	21957		
	b	State and local real estate taxes (see instructions)	5b	9989		
	c	State and local personal property taxes	5c	166		
	d	Add lines 5a through 5c	5d	32112		
	e	Enter the smaller of line 5d or $10,000 ($5,000 if married filing separately)	5e	10000		
	6	Other taxes. List type and amount:	6			
	7	Add lines 5e and 6			7	10000
Interest You Paid Caution: Your mortgage interest deduction may be limited. See instructions.	8	Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box ☐				
	a	Home mortgage interest and points reported to you on Form 1098. See instructions if limited	8a	14153		
	b	Home mortgage interest not reported to you on Form 1098. See instructions if limited. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address	8b			
	c	Points not reported to you on Form 1098. See instructions for special rules	8c			
	d	Reserved for future use	8d			
	e	Add lines 8a through 8c	8e	14153		
	9	Investment interest. Attach Form 4952 if required. See instructions	9			
	10	Add lines 8e and 9			10	14153
Gifts to Charity Caution: If you made a gift and got a benefit for it, see instructions.	11	Gifts by cash or check. If you made any gift of $250 or more, see instructions	11	199		
	12	Other than by cash or check. If you made any gift of $250 or more, see instructions. You **must** attach Form 8283 if over $500	12	500		
	13	Carryover from prior year	13			
	14	Add lines 11 through 13			14	699
Casualty and Theft Losses	15	Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions			15	
Other Itemized Deductions	16	Other—from list in instructions. List type and amount:			16	
Total Itemized Deductions	17	Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040 or 1040-SR, line 12			17	24852
	18	If you elect to itemize deductions even though they are less than your standard deduction, check this box ☐				

Healthcare Entry Sheet 2022

► Keep for your records

The forms associated with healthcare (3853 and this Healthcare Entry Sheet) both interact with information from the information worksheet. Be sure to enter all personal information including dependents listed on the return **before** using this sheet to track health insurance coverage.

Yes	No/Partial	
X		Everyone on the tax return was covered by health insurance all year.

If everyone on the return was covered then check the YES box above - no other action is required.

Health Insurance Coverage for Individuals: Use this form to report healthcare coverage for individuals for months:

- not reported on 1095-A, 1095-B or 1095-C
- not covered by employer
- months not covered by an exemption

Note: The FTB is not requiring the 1095-B or 1095-C be filed with the returns. Keep these forms for your records and track the the months using the checkboxes below.

If applicable enter Market Place exemptions (ECNs) or Request exemptions on form 3853

	a. Name of covered individual(s) / **b.** SSN	**c.** DOB	Covered all 12 months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
1	LEELA SESHU REDDY CHEEDEPUDI			*Oct 2021			*Nov 2021			*Dec 2021						
	024-88-7197	12/11/78	X	X	X	X	X	X	X	X	X	X	X	X	X	T
2	VANI YENUMULA			*Oct 2021			*Nov 2021			*Dec 2021						
	382-35-7565	10/22/82	X	X	X	X	X	X	X	X	X	X	X	X	X	S
3	PRATEEK R CHEEDEPUDI			*Oct 2021			*Nov 2021			*Dec 2021						
	380-35-5303	08/23/08	X	X	X	X	X	X	X	X	X	X	X	X	X	1
4	TARA R CHEEDEPUDI			*Oct 2021			*Nov 2021			*Dec 2021						
	768-47-7952	02/26/13	X	X	X	X	X	X	X	X	X	X	X	X	X	2
5				*Oct 2021			*Nov 2021			*Dec 2021						
6				*Oct 2021			*Nov 2021			*Dec 2021						

*Coverage for October, November or December of 2021 may be needed in order to calculate the short gap coverage exemption if there was no coverage or exemptions in January or February of 2022. If an individual had an exemption in October, November or December of 2021, count that as coverage for that month above. (Note this is only for October, November or December of 2021.)

To review the detail of each person listed on the return (covered, not covered, exempt) and to see any penalty calculation go to the **Health Care Individual Responsibility Smart Worksheet** on Form 3853. . . . . ► ________

Completion checkbox:

☐ Check this box once you are finished with all the healthcare related entries.

California Information Worksheet 2022

► Keep for your records

Part I — Personal Information

Taxpayer:
First Name . . . . . . LEELA SESHU REDDY
Middle Initial . . . . . . Suffix . . .
Last Name . . . . CHEEDEPUDI
Social Security No. . . 024-88-7197
Date of Birth . . . . . . 12/11/1978 *(mm/dd/yyyy)*
or age as of 1-1-2023 44
Date of Death . . . . . *(mm/dd/yyyy)*
Legally blind . . . . . ☐
Daytime Phone . . . . (408)657-3748 Ext

Spouse/RDP:
First Name . . . . . . .VANI
Middle Initial . . . . . . Suffix . .
Last Name . . . . . . .YENUMULA
Social Security No. . .382-35-7565
Date of Birth . . . . . . 10/22/1982 *(mm/dd/yyyy)*
or age as of 1-1-2023 40
Date of Death . . . . . *(mm/dd/yyyy)*
Legally blind . . . . . .☐
Daytime Phone. . . . . Ext

Home phone . . . . .
Your email address to print on Form 540, 540NR or 540X (optional) . . . . .
Check to print phone number on Form 540. . [X] Taxpayer daytime ☐ Spouse/RDP day ☐ Home

c/o Address . . . .
Street Address . .1928 Everglades Dr
Unit Description . . Unit Number Private Mailbox (PMB) .
City. . . . . .Milpitas State. . . . . CA ZIP Code 95035-6612
Foreign province/county Foreign postal code
Foreign country . .

Principal Residence (California Resident filers only):
County in California. . . . . . Santa Clara
Is your address above the same as your principal/physical residence address? . . . . **Yes** [X] **No** ☐
If not, enter your principal/physical residence address below:
Street address (number and street) or PO box. . .
Apartment number or suite number . . . .
City. . State. . . . . ZIP code. . . . .

Military Filers:
☐ APO ☐ FPO
For Military Extension:
Military indicator . . ► Taxpayer Spouse/RDP

Part II — Main Form

[X] Form 540: Resident Income Tax Return. . . . . ►
☐ Form 540NR: Nonresident or Part-Year Resident Income Tax Return . . . . ►
Enter your state of residence as of December 31, 2022 . . . . CA
[X] Resident entire year
☐ Resident part of year
Date you established residence in state above . . . .
In which state (or foreign country) did you reside before this change? . . . .
QuickZoom to enter Part-Year and Nonresident income allocations on Schedule CA(NR) . . ►

Part III — Filing Status

☐ Single
[X] Married/RDP filing joint return
☐ Married/RDP filing separate return
☐ You **did not** live with spouse at any time during the year
Yes **No**
☐ ☐ If filing electronically, is spouse a CA Nonresident?
☐ ☐ If filing electronically, is spouse Active Duty Military?
☐ Head of household (with qualifying person) **Stop.** See instructions.
If the 'qualifying person' is your child but **not** your dependent:
Child's name . . . .
Child's social security number . . .
☐ Qualifying Surviving Spouse
Year spouse/RDP died . . . ☐ 2020 ☐ 2021
If the 'qualifying person' is your child but **not** your dependent:
Child's First name Last Name
☐ Check the box if your California filing status is different from your federal filing status.

Part IV — Dependent Information

First Name	I	Last Name	*	**	Social Security No.	Relationship	DOB	DOD
PRATEEK	R	CHEEDEPUDI	☐		380-35-5303	Son	08/23/08	
TARA	R	CHEEDEPUDI	☐		768-47-7952	Daughter	02/26/13	
			☐					
			☐					

***** Check this box if this dependent was ineligible for an SSN or ITIN and **was a resident of Canada or Mexico** (see Form 3568)
** Select resident of either Mexico or Canada if ineligible for SSN or ITIN

Part V — Standard Deduction/Itemized Deductions

- [ ] Calculate California itemized deductions even if itemized deductions are less than the standard deduction
- [ ] You are married filing separately and your spouse itemized deductions
- [ ] Take the standard deduction even if less than itemized deductions

Part VI — Other Information

Prior Name:
If you filed your 2021 return under a different last name, enter the last name **only** from the 2021 return . . . . ► Taxpayer . ______ Spouse/RDP ______

Dependent of Someone Else:

Taxpayer	Spouse	
[ ]	[ ]	Can someone (such as a parent) claim you and/or your spouse/RDP as a dependent?

Interest and Penalties:
Returns filed late: Enter interest, late return and late payment penalties . . . . ______

Farmers and Fishermen:
- [ ] At least two-thirds of your 2021 or 2022 gross income is from farming or fishing
- [ ] Return will be filed and tax due will be paid by March 1, 2023

Mandatory Electronic Payments
- [X] You are required to make California tax payments electronically
- [ ] A waiver is or will be in effect for the current year
- [ ] Force print all payment vouchers even if required to pay electronically

Schedule W-2:
- [ ] You do **not** want to complete Schedule W-2

Executor/Guardian Information: First Name MI Last Name Suf.
Executor/Guardian . . . . ______
Surviving Spouse Indicator . . . . [ ] Check this box instead of entering the Spouse/RDP name above
Executor type (if filing electronically) . ______

Third Party Designee:

Yes	No	
[ ]	[ ]	Do you want to allow another person to discuss your return with the Franchise Tax Board?

If yes, enter the person's name . . . . ______ Telephone . . ______
First . ______ Middle init . ___ Last Name ______ Suffix ___

Disasters:
- [ ] Claiming a disaster loss (see FTB Publication 1034)

QuickZoom to enter disaster explanation . . . . ► ______

Outside of the USA:
- [ ] You were living or traveling outside the United States on April 18, 2023

Special Condition Text (prints at the top of Form 540 or 540NR)

______

Voter Registration:
- [ ] Register to vote if you meet the requirements (see tax help)

Part VII — Direct Deposit Information or Direct Debit Information

Yes	No	
X		Do you want to elect direct deposit of state tax refund?
	X	Do you want direct debit of state tax payment? (EF Only)
		Do you want direct debit of state tax payment for the **amended return**? (EF Only)

Bank Information:
Enter the following information if you want to directly deposit any state tax refund or direct debit of state tax payment:

Name of Financial Institution (optional) . . . . . Bank of America
Account type . . . . Checking . [X] Savings . [ ]
Routing number 011000138
Account number 009514643274

Enter the following information only if you are requesting direct debit of balance due:
Enter the payment date to debit the account above . . . . ______
State balance-due amount from this return . . . . ______

Direct debit of balance due with amended return information:
Payment date to debit the account above . . . . ______
State balance-due amount paid with this amended return . . . . ______

Qualified Disaster
Do you qualify for extended filing and payment because of a Qualified Disaster? [ ] Yes [ ] No
Enter the new due date for the Qualified Disaster . . . . ► ______

International ACH Transactions

Yes	No	
	X	Will the funds for this refund (or payment) go to (or come from) an account outside the U.S.?

Part VIII – California Contributions

1	California Seniors Special Fund (Taxpayer)	1	
2	California Seniors Special Fund (Spouse/RDP)	2	
3	Alzheimer's Disease and Related Dementia Voluntary Tax Contribution Fund	3	
4	Rare and Endangered Species Preservation Voluntary Tax Contribution Program	4	
5	California Breast Cancer Research Voluntary Tax Contribution Fund	5	
6	California Firefighters' Memorial Voluntary Tax Contribution Fund	6	
7	Emergency Food For Families Voluntary Tax Contribution Fund	7	
8	California Peace Officer Memorial Foundation Voluntary Tax Contribution Fund	8	
9	California Sea Otter Voluntary Tax Contribution Fund	9	
10	California Cancer Research Voluntary Tax Contribution Fund	10	
11	School Supplies for Homeless Children Fund	11	
12	State Parks Protection Fund/Parks Pass Purchase	12	
13	Protect Our Coast and Oceans Voluntary Tax Contribution Fund	13	
14	Keep Arts in Schools Voluntary Tax Contribution Fund	14	
15	Prevention of Animal Homelessness & Cruelty Voluntary Tax Contribution Fund	15	
16	California Senior Citizen Advocacy Voluntary Tax Contribution Fund	16	
17	Native California Wildlife Rehabilitation Voluntary Tax Contribution Fund	17	
18	Rape Kit Backlog Voluntary Tax Contribution Fund	18	
19	Suicide Prevention Voluntary Tax Contribution Fund	19	
20	Mental Health Crisis Prevention Voluntary Tax Contribution Fund	20	
21	California Community and Neighborhood Tree Voluntary Tax Contribution Fund	21	

Part IX — Extension Status

Yes	No	
[ ]	[X]	Have you filed Form 3519 - "Payment Voucher for Automatic Extension for Individuals" **or** extended the federal tax return?

If Yes, enter the extended due date . . . .

QuickZoom to Form 3519: Payment voucher for automatic extension . . . . ►

Automatic extension information for military filers (Electronic Filing Only):

	Taxpayer	Spouse
Beginning Military Date		
Ending Military Date		
Combat zone/QHDA Operation or Area Served		

Part X — Amended Return

[ ] Are you filing a California amended return?

Enter the tax year you are amending . . . . .

Previous California payment made . . . . . .

Previous California refund received . . . . . .

QuickZoom here to Schedule X . . . . ►

QuickZoom to Form 540 . . . . ►

QuickZoom to Form 540NR. . . . . ►

Part XI — Mortgage Interest Adjustment

[ ] Reviewed Mortgage and Interest Adjustments

caiw8412.SCR 03/02/23

Tax Payments Worksheet 2022

► Keep for your records

Name	Social Security Number
L CHEEDEPUDI & V YENUMULA	024-88-7197

Tax Payments for the Current Year

		State	
		Date	Payment
1	First Payment		
2	Second Payment		
3	Third Payment		
4	Fourth Payment		
	Additional Payments		
5	Payment		
	Payment		
	Payment		
	Payment		
	Payment		

6	Overpayment from previous year applied to current year	6	
7	Amount paid with current year extension	7	
8	**Total tax payments**	8	

Income Taxes Withheld for the Current Year

9	State withholding on Forms W-2	9	19,270.
10	State withholding on Forms W-2G	10	
11	State withholding on Forms 1099-R	11	
12 a	State withholding on Forms 1099-MISC	12 a	
b	State withholding on Forms 1099-NEC	b	
c	State withholding on Forms 1099-G	c	
d	State withholding on Forms 1099-K	d	
13	Other state tax withholding	13	
14	**Total income tax withheld**	14	19,270.
15	Date return will be filed and balance paid	15	

California Carryover Worksheet 2022

Use this worksheet to enter information from your 2021 tax return
which will be used on your 2022 tax return

► Keep for your records

Name as Shown on Return	Social Security Number
L CHEEDEPUDI & V YENUMULA	024-88-7197

2021 Tax and Income Information

1 Filing status:

- ☐ Single
- ☐ Married Filing Joint
- ☐ Married Filing Separate
- ☐ Head of Household
- ☐ Qualifying Surviving Spouse

2	Tax liability (Form 540, lines 48, 61, 62; Form 540 2EZ, line 21; or Form 540NR, lines 63, 71 and 72; plus any IRC Section 453A interest from Form 540 line 63 or Form 540NR line 73)	**2**	22,759.
3	Tax on lump-sum distributions (Schedule G-1)	**3**	
4	California income tax withheld (Form 540, lines 71 and 73; Form 540 2EZ, line 22 or Form 540NR, lines 81 and 83)	**4**	26,602.
5	Excess California SDI withheld (Form 540, line 74; or Form 540NR, line 84)	**5**	1,310.
6	California adjusted gross income (Form 540, line 17; Form 540 2EZ, line 16; or Form 540NR, line 32)	**6**	344,452.
7	Refund (Form 540, line 115; Form 540 2EZ, line 28; or Form 540NR, line 125)	**7**	5,153.
8	Balance Due (Form 540, line 114; Form 540 2EZ, line 27; or Form 540NR, line 124)	**8**	

Loss Carryovers (Non-passive)

			Regular Tax	AMT
9 a	Capital loss carryover	**9 a**	0.	0.
b	Capital loss carryover (nonresidents)	**b**		
10	Schedule D-1 - Nonrecaptured net section 1231 losses from:			
a	2021	**10 a**		
b	2020	**b**		
c	2019	**c**		
d	2018	**d**		
e	2017	**e**		

Other Carryovers

11	Disallowed investment interest expense carryforward (Form 3526, line 7)	**11**	
12	Disallowed alternative minimum tax investment interest expense carryforward (Form 3526-AMT, line 7)	**12**	
13	Net operating loss carryforward from Form 3805V	**13**	
14	Disaster loss carryforward from Form 3805V	**14**	

Form 3510 (Credit for Prior Year Alternative Minimum Tax)

15	**Form 3510 information - 2021 Resident filers**		
a	Schedule P, Part I, line 15 through line 18	**15 a**	
b	Schedule P, Part I, line 1 through line 7, 13b, 13i, and any other exclusions on a line other than those listed	**b**	
c	Schedule P, Part II, line 25	**c**	
d	Schedule P, Part II, line 26	**d**	
e	Schedule P, Part III, Section C, lines 22 and 23, column b	**e**	
16	**Form 3510 information - 2021 Nonresident or Part-year residents**		
a	Schedule P(NR), Part I, line 15 through line 18	**16 a**	
b	Schedule P(NR), Part I, line 1 through line 7, 13b, 13i and any other exclusions on a line other than those listed	**b**	
c	Schedule P(NR), Part II, line 35	**c**	
d	Schedule P(NR), Part II, line 28	**d**	
e	Schedule P(NR), Part II, line 29a and 29h	**e**	
f	Schedule P(NR), Part II, line 44	**f**	
g	Schedule P(NR), Part II, line 45	**g**	
h	Schedule P(NR), Part III, Section C, lines 22 and 23, column b	**h**	

Charitable Contribution Carryforward

17	Schedule CA/CA(NR) - Charitable Contribution Carryforward		
a	2022	**17 a**	
b	2021	**b**	
c	2020	**c**	
d	2019	**d**	
e	2018	**e**	

California Capital Loss Carryover Worksheet 2022

► Keep for your records

Name as Shown on Return	Social Security Number
L CHEEDEPUDI & V YENUMULA	024-88-7197

Part I — Capital Loss Carryover Worksheet

1	Loss from Schedule D, line 11, stated as a positive number	1	3,000.
2	Amount from Form 540 or Form 540NR, line 17	2	273,941.
3	Amount from Form 540 or Form 540NR, line 18	3	25,007.
4	Subtract line 3 from line 2. If less than zero, enter as a negative amount	4	248,934.
5	Combine line 1 and line 4. If less than zero, enter -0-	5	251,934.
6	Enter loss from Schedule D, line 8, stated as a positive amount	6	15,890.
7	Enter the smaller of line 1 or line 5	7	3,000.
8	Subtract line 7 from line 6. This is your capital loss carryover to 2023	8	12,890.

Part II — Capital Loss Carryover Worksheet for Nonresidents and Part-Year Residents

1	Loss from California Schedule D Nonresident and Part-Year Resident Capital Gain/Loss Allocation Worksheet, line 5, stated as a positive number	1	
2	Amount from Form 540NR, line 17	2	
3	Amount from Form 540NR, line 18	3	
4	Subtract line 3 from line 2. If less than zero, enter as a negative amount	4	
5	Combine line 1 and line 4. If less than zero, enter -0-	5	
6	Loss from California Schedule D Nonresident and Part-Year Resident Capital Gain/Loss Allocation Worksheet, line 4, stated as a positive amount	6	
7	Enter the smaller of line 1 or line 5	7	
8	Subtract line 7 from line 6. This is your capital loss carryover to 2023	8	

Two-Year Comparison 2022

L CHEEDEPUDI & V YENUMULA

Income	2021	2022	Difference	%
Federal AGI and California Adjustments:				
Federal adjusted gross income	348,709.	273,941.	-74,768.	-21.44
California adjustments	-4,257.	0.	4,257.	100.00
Adjusted Gross Income	344,452.	273,941.	-70,511.	-20.47
Standard or Itemized Deduction	23,890.	25,007.	1,117.	4.68
Taxable Income	320,562.	248,934.	-71,628.	-22.34
Tax	23,817.	16,658.	-7,159.	-30.06
Exemption credits	1,058.	1,146.	88.	8.32
Tax less exemption credits	22,759.	15,512.	-7,247.	-31.84
Schedule G-1 and Form 5870A tax				
Tax before credits	22,759.	15,512.	-7,247.	-31.84
Credits				
Tax after credits	22,759.	15,512.	-7,247.	-31.84
Alternative minimum tax		0.	0.	
Other taxes and IRC interest		0.	0.	
Total Tax After Credits	22,759.	15,512.	-7,247.	-31.84
Withholding	26,602.	19,270.	-7,332.	-27.56
Estimated payments				
Other payments	1,310.		-1,310.	-100.00
Total Payments	27,912.	19,270.	-8,642.	-30.96
Use tax	0.	0.	0.	
ISR Penalty				
Contributions				
Form 5805/5805F penalty				
Other penalties and interest				
Applied to next year's estimated tax				
Amount Refund	5,153.	3,758.	-1,395.	-27.07
Amount Due				

Current year effective tax rate . . . 5.66 %

California Electronic Filing Information Worksheet 2022

► Keep for your records

Name as Shown on Return	Social Security Number
L CHEEDEPUDI & V YENUMULA	024-88-7197

Electronic Return Originator Information

The program calculates this information based on the preparer code entered on the federal information worksheet (or the ERO code entered on the federal electronic filing information worksheet if you are an intermediate service provider).

Firm Name

Social Security Number/Preparer Tax ID Number

Name

Phone Number

Fax Number

Address

Employer Identification Number

City

State

Zip Code

EFIN

Country

E-mail Address

Paid Preparer Information

Firm Name

Social Security Number/Preparer Tax ID Number

Name

Employer Identification Number

Address

Phone Number

Fax Number

City

State

Zip Code

Country

E-mail Address

Electronic Filing Review Check

If any of the questions below are checked yes, the return may not be filed electronically

		Yes	No
1	Are there more than fifty W-2s, or twenty 1099-Rs?		X
2	Are there more than ten copies of Form 3803 or ten copies of Form 3805E?		X
3	Are there more than twenty five copies of Schedule S?		X
4	Is there an amended Form 3805P attached?		X
5	Were any entries made for Form 3503, 3507, 3546, 3553, 3807, 3808, 3809, or 5870A?		X
6	Is there withholding from a form other than W-2, W-2G, 1099R, 1099G, 1099B, 1099INT 1099DIV, 1099MISC, 592-B, and 593?		X
7	Are any invalid entries made on Form 3805V page 3, part III? (See help)		
8	Are there more than 97 detail lines on forms to be filed? (See help)		
9	Is this a fiscal year filer?		X
10	Is Form 3506 being filed to claim credit for prior year expenses or the taxpayer or spouse is claimed as a qualifying person?		X
11	Is the Federal filing status married filing joint and the California filing status married filing separate?		X
12	Is Federal Form 4852 (substitute W2) being used?		
13	Check that you have the correct selections for the RDP return?		X
14	On the 3506, are there any foreign care providers?		X
15	Is Direct Debit selected and no balance due on the return?		

Smart Worksheets From 2022 California Tax Return

SMART WORKSHEET FOR: Form 540: California Resident Income Tax Return

Form 540 California Income Tax Withheld Smart Worksheet

A	California income tax withheld from the Tax Payments Worksheet	19,270.
B	Real estate and other withholding from Form(s) 592-B and 593 entered on the federal Tax Payments Worksheet and included on line A . . . . . . **Note**: Make sure that the amount on line B is reported on the federal Tax Payments Worksheet line(s) 18a-c or you will not get the state income tax deduction on your federal Schedule A.	
C	California income tax withheld for line 71. Subtract line B from line A	19,270.

SMART WORKSHEET FOR: Schedule D (540): California Capital Gain or Loss Adjustment

Capital Gains and Losses Smart Worksheet

*Enter dispositions of capital assets related to a **specific activity** (i.e., Schedule C, E, etc) on the Disposition Worksheets for non-depreciable assets for that activity. To get there, go to the activity form and **QuickZoom** to the Disposition Worksheet. Entries on the Disposition Worksheets for non-depreciable assets flow to line 1.*

*Enter dispositions **not** related to a specific activity in the smart worksheet below.*

Note: California did not conform to the deferral of capital gains reinvested in a Qualified Opportunity Fund. The gain realized on the sale of these assets will be reported in Column (e).

Description		*			
Date Acquired	**Date Sold**		**Sales price**	**Cost or other basis**	**Gain/ loss**
1099-B BYPASSING 8949					
VARIOUS	VARIOUS		15,704.	17,149.	-1,445.
1099-B BYPASSING 8949					
VARIOUS	VARIOUS		13.	17.	-4.
61.00 SCHWAB US SMALL CAP ETF					
VARIOUS	01/21/2022		5,649.	6,155.	-506.
102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF					
VARIOUS	01/28/2022		3,587.	3,937.	-350.
76.00 ISHARES CORE MSCI EMERGING ETF					
08/19/2021	02/24/2022		4,223.	4,604.	-381.
See Schedule D Transactions					

* Check box to exclude transaction from Schedule D

Other Capital Gains and/or Losses

A Federal Form 1099-R gains ►

B Federal Form 4684 gain ►

C Federal Form 6781 gains or losses ►

D Federal Form 8824 gain ►

E Canadian RRSP account total capital gain ►

F Net capital gain or loss from HSA account ►

G Net IRC Section 1231 gain from Schedule D-1, line 9 or line 7 ►

H Form FTB 3805E ►

I 1 Gain attributable to sale of Qualified Small Business stock included on Line H above ►

2 Gain qualifying under R&TC 18152.5 ►

J Capital gain adjustment for federal gain arising from casualty theft/loss of employee business property ►

K Check this box to print Schedule D and its worksheets even if you are not required to

SMART WORKSHEET FOR: Schedule D (540): California Capital Gain or Loss Adjustment

Capital Gain Distributions Smart Worksheet

A	Capital Gain Distributions from federal Schedule D	236.
B	Less: Capital Gain Distributions from federal Form 8814	
C	Plus: Capital Gain Distributions from FTB Form 3803	
D	Other Capital Gain Distributions adjustment	
E	Total California Capital Gain Distributions	236.

SMART WORKSHEET FOR: Schedule P (540): Alternative Minimum Tax and Credit Limitations

Adjusted Gain or Loss Line 9 Smart Worksheet

		AMT	Regular Tax
1	Adjusted capital gains or losses	-15,890.	-15,890.
2	Other adjustments to gains and losses		
3	Adjusted long-term capital gain from Form 4797		
4	Other adjustments to long-term capital from Form 4797		
5	Adjusted ordinary gains or losses		
6	Other adjustments to ordinary gains or losses		
7	Recomputed adjusted gain or loss		

SMART WORKSHEET FOR: Schedule P (540): Alternative Minimum Tax and Credit Limitations

Incentive Stock Options Smart Worksheet

A	Incentive stock options from Schedule K-1 Worksheets	
B	Other incentive stock options	18,675.

SMART WORKSHEET FOR: Schedule P (540): Alternative Minimum Tax and Credit Limitations

Alternative Minimum Tax NOL Deduction Line 20 Smart Worksheet

A	Adjusted alternative minimum taxable income without AMT NOL from line 19 above	277,764.
B	Alternative minimum tax NOL deduction limitation. Line A times 90%	249,988.
C	Alternative tax net operating loss deduction	
D	Lesser of line B or line C. Enter this amount on line 20	

Additional Information From 2022 California Tax Return

SMART WORKSHEET FOR: Schedule D (540): California Capital Gain or Loss Adjustment

Schedule D Transactions Continuation Statement

Date Acquired	Date Sold	Sales price	Cost or other basis	Gain/ loss
184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF				
VARIOUS	02/24/2022	5,423.	5,821.	-398.
134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF				
VARIOUS	03/04/2022	4,071.	4,524.	-453.
70.00 SCHWAB INTERNATIONAL EQUITY ETF				
VARIOUS	03/04/2022	2,415.	2,787.	-372.
43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF				
VARIOUS	03/07/2022	1,506.	1,805.	-299.
23.00 ISHARES CALIFORNIA MUNI BOND ETF				
VARIOUS	04/14/2022	1,309.	1,440.	-131.
257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF				
02/24/2022	04/25/2022	4,953.	5,423.	-470.
191.00 SCHWAB EMERGING MARKETS EQUITY ETF				
VARIOUS	04/25/2022	4,927.	5,365.	-438.
18.00 VANGUARD SMALL CAP ETF				
01/21/2022	04/28/2022	3,532.	3,715.	-183.
94.00 SCHWAB US LARGE CAP ETF				
VARIOUS	04/28/2022	4,695.	4,791.	-96.
117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF				
01/28/2022	05/06/2022	3,693.	4,005.	-312.
29.00 XTRACKERS INTER REAL ESTETF				
VARIOUS	05/09/2022	678.	842.	-164.
107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF				
VARIOUS	06/10/2022	5,180.	5,484.	-304.
225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF				
04/25/2022	06/13/2022	5,901.	6,137.	-236.
126.00 ISHARES CORE MSCI EMERGING ETF				
VARIOUS	06/13/2022	6,168.	6,491.	-323.
135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF				
VARIOUS	06/13/2022	7,052.	7,523.	-471.
11.00 VANGUARD SMALL CAP ETF				
01/21/2022	06/16/2022	1,884.	2,271.	-387.
123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF				
03/04/2022	06/16/2022	5,015.	5,341.	-326.
130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF				
VARIOUS	06/16/2022	3,978.	4,278.	-300.
62.00 VANGUARD FTSE DEVELOPED MARKETS ETF				
03/04/2022	06/23/2022	2,489.	2,804.	-315.
20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF				
03/07/2022	07/05/2022	1,989.	2,316.	-327.
44.00 INVESCO FTSE RAFI US 1500 SMALL-MID				
06/10/2022	07/12/2022	6,851.	7,133.	-282.
245.00 SCHWAB EMERGING MARKETS EQUITY ETF				
06/13/2022	07/14/2022	5,935.	6,157.	-222.
355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF				
06/13/2022	07/14/2022	6,100.	6,613.	-513.

SMART WORKSHEET FOR: Schedule D (540): California Capital Gain or Loss Adjustment

Schedule D Transactions **Continuation Statement**

Description	*	Date Acquired	Date Sold	Sales price	Cost or other basis	Gain/ loss
177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		VARIOUS	09/07/2022	4,811.	5,095.	-284.
44.00 VANGUARD GLBAL EX US REAL ESTATE ETF		05/09/2022	09/20/2022	1,819.	2,018.	-199.
135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		06/16/2022	09/22/2022	3,661.	3,957.	-296.
181.00 ISHARES CORE MSCI EMERGING ETF		07/14/2022	09/23/2022	8,051.	8,502.	-451.
63.00 INVESCO FTSE RAFI US 1000 ETF		VARIOUS	09/23/2022	8,964.	9,526.	-562.
167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		VARIOUS	09/23/2022	3,904.	4,219.	-315.
153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		VARIOUS	09/23/2022	6,605.	6,993.	-388.
172.00 SCHWAB INTERNATIONAL EQUITY ETF		VARIOUS	09/23/2022	4,924.	5,385.	-461.
89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		VARIOUS	09/27/2022	2,430.	2,775.	-345.
248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		07/14/2022	09/29/2022	5,808.	6,094.	-286.
145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		VARIOUS	10/12/2022	5,097.	5,502.	-405.
349.00 SCHWAB EMERGING MARKETS EQUITY ETF		09/23/2022	10/24/2022	7,517.	8,043.	-526.
211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		VARIOUS	10/24/2022	5,816.	6,052.	-236.
WARNER BROS DISCOVERY INC COM SE 0.004		05/18/2021	04/13/2022	0.	0.	0.
WARNER BROS DISCOVERY INC COM SE 0.018		05/18/2021	04/13/2022	0.	1.	-1.
4.539722 SH. SCHWAB U.S. REIT ETF CLASS O		08/24/2021	05/09/2022	102.	107.	-5.
1.177394 SH. VANGUARD FTSE EMERGING MARKETS CLASS O		08/24/2021	03/08/2022	52.	58.	-6.
0.003339 SH. VANGUARD FTSE EMERGING MARKETS CLASS O		09/02/2021	01/31/2022	0.	0.	0.
0.002187 SH. VANGUARD FTSE EMERGING MARKETS CLASS O		09/02/2021	01/31/2022	0.	0.	0.
0.010515 SH. VANGUARD FTSE EMERGING MARKETS CLASS O		09/02/2021	01/31/2022	1.	1.	0.
0.051665 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O		11/16/2021	09/30/2022	2.	2.	0.
0.055983 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O		12/16/2021	11/30/2022	2.	2.	0.
0.054301 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O		01/03/2022	12/30/2022	2.	2.	0.
0.005795 SH. VANGUARD MID-CAP VALUE ETF CLASS O		01/03/2022	02/28/2022	1.	1.	0.

SMART WORKSHEET FOR: Schedule D (540): California Capital Gain or Loss Adjustment

Schedule D Transactions **Continuation Statement**

Description		*			
Date Acquired	**Date Sold**		**Sales price**	**Cost or other basis**	**Gain/ loss**
0.043410 SH. SCHWAB U.S. REIT ETF CLASS O					
01/04/2022	03/31/2022		1.	1.	0.
0.006642 SH. VANGUARD GLOBAL EX-U.S. REAL ESTATE ETF CLASS O					
01/04/2022	12/30/2022		0.	0.	0.
0.048733 SH. VANGUARD FTSE EMERGING MARKETS CLASS O					
04/18/2022	08/31/2022		2.	2.	0.
0.016970 SH. ISHARES CORE S&P TOTAL U.S. STOCK MA... CLASS O					
06/13/2022	06/30/2022		1.	1.	0.
17.128109 SH. ISHARES CORE MSCI EAFE ETF CLASS O					
08/30/2022	09/30/2022		904.	1,004.	-100.
0.025072 SH. VANGUARD REIT INDEX ETF CLASS O					
09/22/2022	10/31/2022		2.	2.	0.
4.00 SCHWAB US SMALL CAP ETF					
01/06/2021	01/21/2022		370.	370.	0.
12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF					
01/06/2021	01/28/2022		422.	429.	-7.
12.00 SCHWAB INTERNATIONAL EQUITY ETF					
03/02/2021	03/04/2022		414.	448.	-34.
42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF					
VARIOUS	03/04/2022		1,276.	1,318.	-42.
25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF					
VARIOUS	03/07/2022		876.	967.	-91.
48.00 ISHARES CALIFORNIA MUNI BOND ETF					
VARIOUS	04/14/2022		2,732.	2,959.	-227.
37.00 SCHWAB EMERGING MARKETS EQUITY ETF					
VARIOUS	04/25/2022		954.	1,015.	-61.
50.00 SCHWAB US LARGE CAP ETF					
VARIOUS	04/28/2022		2,498.	2,355.	143.
46.00 XTRACKERS INTER REAL ESTETF					
VARIOUS	05/09/2022		1,076.	1,278.	-202.
43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF					
VARIOUS	06/10/2022		2,082.	2,252.	-170.
27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF					
VARIOUS	06/13/2022		708.	775.	-67.
40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF					
VARIOUS	06/13/2022		2,090.	2,186.	-96.
57.00 VANGUARD FTSE DEVELOPED MARKETS ETF					
06/05/2020	06/23/2022		2,289.	2,307.	-18.
106.00 SCHWAB EMERGING MARKETS EQUITY ETF					
VARIOUS	07/14/2022		2,568.	2,640.	-72.
8.00 VANGUARD GLBAL EX US REAL ESTATE ETF					
VARIOUS	09/20/2022		331.	447.	-116.
83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF					
VARIOUS	09/22/2022		2,251.	2,263.	-12.
1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF					
10/02/2020	09/23/2022		23.	28.	-5.
7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF					
01/06/2021	09/23/2022		302.	316.	-14.

SMART WORKSHEET FOR: Schedule D (540): California Capital Gain or Loss Adjustment
Schedule D Transactions Continuation Statement

Description		*			
Date Acquired	**Date Sold**		**Sales price**	**Cost or other basis**	**Gain/ loss**
48.00 SCHWAB INTERNATIONAL EQUITY ETF					
VARIOUS	09/23/2022		1,374.	1,433.	-59.
1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF					
12/20/2018	09/27/2022		27.	29.	-2.
229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF					
VARIOUS	09/29/2022		5,363.	5,391.	-28.
155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF					
06/22/2020	10/12/2022		5,449.	5,447.	2.
12.00 SCHWAB EMERGING MARKETS EQUITY ETF					
VARIOUS	10/24/2022		258.	271.	-13.
27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF					
VARIOUS	10/24/2022		744.	799.	-55.
WARNER BROS DISCOVERY INC COM SE 0.3					
01/24/2018	04/13/2022		8.	8.	0.
WARNER BROS DISCOVERY INC COM SE 0.018					
06/08/2020	04/13/2022		0.	1.	-1.
WARNER BROS DISCOVERY INC COM SE 0.024					
11/16/2020	04/13/2022		1.	1.	0.
WARNER BROS DISCOVERY INC COM SE 0.018					
01/11/2021	04/13/2022		0.	1.	-1.
0.258829 SH. VANGUARD FTSE EMERGING MARKETS CLASS 0					
08/24/2021	09/23/2022		10.	14.	-4.

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return **2022** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box.
☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

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:

Your first name and middle initial	Last name	Your social security number
LEELA SESHU REDDY	CHEEDEPUDI	024-88-7197
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
VANI	YENUMULA	382-35-7565

Home address (number and street). If you have a P.O. box, see instructions. 1928 Everglades Dr — Apt. no.

City, town, or post office. If you have a foreign address, also complete spaces below. Milpitas — State CA — ZIP code 950356612

Foreign country name — Foreign province/state/county — Foreign postal code

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

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, 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, 1958 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions): If more than four dependents, see instructions and check here ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Child tax credit	Credit for other dependents
PRATEEK R	CHEEDEPUDI	380-35-5303	Son	☒	☐
TARA R	CHEEDEPUDI	768-47-7952	Daughter	☒	☐
				☐	☐
				☐	☐

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.

1a	Total amount from Form(s) W-2, box 1 (see instructions)			1a	268,854.
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	0.
i	Nontaxable combat pay election (see instructions)	1i			
z	Add lines 1a through 1h			1z	268,854.
2a	Tax-exempt interest	2a	93.	2b	b Taxable interest 268.
3a	Qualified dividends	3a	3,309.	3b	b Ordinary dividends 4,019.
4a	IRA distributions	4a		4b	b Taxable amount
5a	Pensions and annuities	5a		5b	b Taxable amount
6a	Social security benefits	6a		6b	b Taxable amount
c	If you elect to use the lump-sum election method, check here (see instructions) ☐				
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐			7	-3,000.
8	Other income from Schedule 1, line 10			8	3,800.
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income**			9	273,941.
10	Adjustments to income from Schedule 1, line 26			10	
11	Subtract line 10 from line 9. This is your **adjusted gross income**			11	273,941.
12	**Standard deduction or itemized deductions** (from Schedule A)			12	25,900.
13	Qualified business income deduction from Form 8995 or Form 8995-A			13	32.
14	Add lines 12 and 13			14	25,932.
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income**			15	248,009.

Attach Sch. B if required.

Standard Deduction for—
- Single or Married filing separately, $12,950
- Married filing jointly or Qualifying surviving spouse, $25,900
- Head of household, $19,400
- If you checked any box under *Standard Deduction*, see instructions.

Tax and Credits

16	**Tax** (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐			16	46,895.
17	Amount from Schedule 2, line 3			17	0.
18	Add lines 16 and 17			18	46,895.
19	Child tax credit or credit for other dependents from Schedule 8812			19	4,000.
20	Amount from Schedule 3, line 8			20	4,477.
21	Add lines 19 and 20			21	8,477.
22	Subtract line 21 from line 18. If zero or less, enter -0-			22	38,418.
23	Other taxes, including self-employment tax, from Schedule 2, line 21			23	353.
24	Add lines 22 and 23. This is your **total tax**			24	38,771.

Payments

25	Federal income tax withheld from:				
a	Form(s) W-2	25a	41,115.		
b	Form(s) 1099	25b			
c	Other forms (see instructions)	25c	1.		
d	Add lines 25a through 25c			25d	41,116.
26	2022 estimated tax payments and amount applied from 2021 return			26	
27	Earned income credit (EIC) No	27			
28	Additional child tax credit from Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Reserved for future use	30			
31	Amount from Schedule 3, line 15	31			
32	Add lines 27, 28, 29, and 31. These are your **total other payments and refundable credits**			32	
33	Add lines 25d, 26, and 32. These are your **total payments**			33	41,116.

If you have a qualifying child, attach Sch. EIC.

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**			34	2,345.
35a	Amount of line 34 you want **refunded to you**. If Form 8888 is attached, check here ☐			35a	2,345.
b	Routing number 011000138 c Type: ☒ Checking ☐ Savings				
d	Account number 009514643274				
36	Amount of line 34 you want **applied to your 2023 estimated tax**	36			

Direct deposit? See instructions.

Amount You Owe

37	Subtract line 33 from line 24. This is the **amount you owe**. For details on how to pay, go to *www.irs.gov/Payments* or see instructions			37	
38	Estimated tax penalty (see instructions)	38			

Third Party Designee

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

Designee's name | Phone no. | Personal identification number (PIN)

Sign Here

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		Software Engineer	
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
		Project Manager	
Phone no. (408)657-3748	Email address		

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

Paid Preparer Use Only

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

SCHEDULE 1 (Form 1040)

Department of the Treasury Internal Revenue Service

Additional Income and Adjustments to Income

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **01**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes			1	0.
2a	Alimony received			2a	
b	Date of original divorce or separation agreement (see instructions):				
3	Business income or (loss). Attach Schedule C			3	
4	Other gains or (losses). Attach Form 4797			4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E			5	
6	Farm income or (loss). Attach Schedule F			6	
7	Unemployment compensation			7	
8	Other income:				
a	Net operating loss	8a	( )		
b	Gambling	8b			
c	Cancellation of debt	8c			
d	Foreign earned income exclusion from Form 2555	8d	( )		
e	Income from Form 8853	8e			
f	Income from Form 8889	8f			
g	Alaska Permanent Fund dividends	8g			
h	Jury duty pay	8h			
i	Prizes and awards	8i			
j	Activity not engaged in for profit income	8j			
k	Stock options	8k			
l	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	8l			
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m			
n	Section 951(a) inclusion (see instructions)	8n			
o	Section 951A(a) inclusion (see instructions)	8o			
p	Section 461(l) excess business loss adjustment	8p			
q	Taxable distributions from an ABLE account (see instructions)	8q			
r	Scholarship and fellowship grants not reported on Form W-2	8r			
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	( )		
t	Pension or annuity from a nonqualifed deferred compensation plan or a nongovernmental section 457 plan	8t			
u	Wages earned while incarcerated	8u			
z	Other income. List type and amount: Other Income from box 3 of 1099-Misc 3,800.	8z	3,800.		
9	Total other income. Add lines 8a through 8z			9	3,800.
10	Combine lines 1 through 7 and 9. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8			10	3,800.

Part II Adjustments to Income

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

SCHEDULE 2
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Taxes

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

OMB No. 1545-0074
2022
Attachment Sequence No. 02

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Tax

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

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE			4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5			
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6			
7	Total additional social security and Medicare tax. Add lines 5 and 6			7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐			8	
9	Household employment taxes. Attach Schedule H			9	
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required			10	
11	Additional Medicare Tax. Attach Form 8959			11	304.
12	Net investment income tax. Attach Form 8960			12	49.
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12			13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares			14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over $150,000			15	
16	Recapture of low-income housing credit. Attach Form 8611			16	

(continued on page 2)

Part II Other Taxes *(continued)*

17	Other additional taxes:				
a	Recapture of other credits. List type, form number, and amount:	17a			
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	17b			
c	Additional tax on HSA distributions. Attach Form 8889	17c			
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889	17d			
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e			
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f			
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g			
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h			
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i			
j	Section 72(m)(5) excess benefits tax	17j			
k	Golden parachute payments	17k			
l	Tax on accumulation distribution of trusts	17l			
m	Excise tax on insider stock compensation from an expatriated corporation	17m			
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n			
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o			
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p			
q	Any interest from Form 8621, line 24	17q			
z	Any other taxes. List type and amount:	17z			
18	Total additional taxes. Add lines 17a through 17z			18	
19	Reserved for future use			19	
20	Section 965 net tax liability installment from Form 965-A	20			
21	Add lines 4, 7 through 16, and 18. These are your **total other taxes**. Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b			21	353.

SCHEDULE 3 (Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Credits and Payments

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

OMB No. 1545-0074
2022
Attachment Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required			1	175.
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441			2	
3	Education credits from Form 8863, line 19			3	
4	Retirement savings contributions credit. Attach Form 8880			4	
5	Residential energy credits. Attach Form 5695			5	4,302.
6	Other nonrefundable credits:				
a	General business credit. Attach Form 3800	6a			
b	Credit for prior year minimum tax. Attach Form 8801	6b			
c	Adoption credit. Attach Form 8839	6c			
d	Credit for the elderly or disabled. Attach Schedule R	6d			
e	Alternative motor vehicle credit. Attach Form 8910	6e			
f	Qualified plug-in motor vehicle credit. Attach Form 8936	6f			
g	Mortgage interest credit. Attach Form 8396	6g			
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h			
i	Qualified electric vehicle credit. Attach Form 8834	6i			
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j			
k	Credit to holders of tax credit bonds. Attach Form 8912	6k			
l	Amount on Form 8978, line 14. See instructions	6l			
z	Other nonrefundable credits. List type and amount:	6z			
7	Total other nonrefundable credits. Add lines 6a through 6z			7	
8	Add lines 1 through 5 and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20			8	4,477.

(continued on page 2)

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962		9
10	Amount paid with request for extension to file (see instructions)		10
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	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken before April 1, 2021	13b	
c	Reserved for future use	13c	
d	Credit for repayment of amounts included in income from earlier years	13d	
e	Reserved for future use	13e	
f	Deferred amount of net 965 tax liability (see instructions)	13f	
g	Reserved for future use	13g	
h	Credit for qualified sick and family leave wages paid in 2022 from Schedule(s) H for leave taken after March 31, 2021, and before October 1, 2021	13h	
z	Other payments or refundable credits. List type and amount:	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z		14
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31		15

SCHEDULE B (Form 1040)

Department of the Treasury Internal Revenue Service

Interest and Ordinary Dividends

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

OMB No. 1545-0074

2022

Attachment Sequence No. **08**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

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:

		Amount
wells fargo bank	1	36.98
NATIONAL FINANCIAL SERVICES LLC		0.43
loanDepot		17.33
BANK OF AMERICA, N.A.		24.10
loandepot com llc		103.42
CHARLES SCHWAB & CO., INC.		85.28
2 Add the amounts on line 1	2	267.54
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3	
4 Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b	4	267.54

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

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:

		Amount
Betterment Securities	5	229.42
CHARLES SCHWAB & CO., INC.		2,771.81
NATIONAL FINANCIAL SERVICES LLC		1,017.32
6 Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b	6	4,018.55

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 2022, 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	X	
	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) are located:		
8	During 2022, 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

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12**

Name(s) shown on return	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b .	15,704.	17,149.		-1,445.
1b Totals for all transactions reported on Form(s) 8949 with **Box A** checked	179,682.	193,114.	7.	-13,425.
2 Totals for all transactions reported on Form(s) 8949 with **Box B** checked				
3 Totals for all transactions reported on Form(s) 8949 with **Box C** checked				

4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 . .	4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your **Capital Loss Carryover Worksheet** in the instructions	6	( )
7 **Net short-term capital gain or (loss).** Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back	7	-14,870.

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b .	13.	17.		-4.
8b Totals for all transactions reported on Form(s) 8949 with **Box D** checked	36,496.	37,751.	3.	-1,252.
9 Totals for all transactions reported on Form(s) 8949 with **Box E** checked				
10 Totals for all transactions reported on Form(s) 8949 with **Box F** checked.				

11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824	11	
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	
13 Capital gain distributions. See the instructions	13	236.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your **Capital Loss Carryover Worksheet** in the instructions	14	( )
15 **Net long-term capital gain or (loss).** Combine lines 8a through 14 in column (h). Then, go to Part III on the back	15	-1,020.

Part III **Summary**

16 Combine lines 7 and 15 and enter the result . . . . **16** -15,890.

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

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

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

17 Are lines 15 and 16 **both** gains?

☐ **Yes.** Go to line 18.

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

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

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

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

☐ **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Form 1040, line 16. **Don't** complete lines 21 and 22 below.

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

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

• The loss on line 16; or

• ($3,000), or if married filing separately, ($1,500) **21** (3,000.)

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

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

☒ **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Form 1040, line 16.

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

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return	**Social security number or taxpayer identification number**
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
61.00 SCHWAB US SMALL CAP ETF	VARIOUS	01/21/22	5,649.	6,155.			-506.
102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	01/28/22	3,587.	3,937.			-350.
76.00 ISHARES CORE MSCI EMERGING ETF	08/19/21	02/24/22	4,223.	4,604.			-381.
184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	VARIOUS	02/24/22	5,423.	5,821.			-398.
134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	VARIOUS	03/04/22	4,071.	4,524.			-453.
70.00 SCHWAB INTERNATIONAL EQUITY ETF	VARIOUS	03/04/22	2,415.	2,787.			-372.
43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	VARIOUS	03/07/22	1,506.	1,805.			-299.
23.00 ISHARES CALIFORNIA MUNI BOND ETF	VARIOUS	04/14/22	1,309.	1,440.			-131.
257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	02/24/22	04/25/22	4,953.	5,423.			-470.
191.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	04/25/22	4,927.	5,365.			-438.
18.00 VANGUARD SMALL CAP ETF	01/21/22	04/28/22	3,532.	3,715.			-183.
94.00 SCHWAB US LARGE CAP ETF	VARIOUS	04/28/22	4,695.	4,791.			-96.
117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	01/28/22	05/06/22	3,693.	4,005.			-312.
29.00 XTRACKERS INTER REAL ESTETF	VARIOUS	05/09/22	678.	842.			-164.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) . .			50,661.	55,214.			-4,553.

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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social security number or taxpayer identification number: 024-88-7197

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

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

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

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

☒ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

☐ **(C)** Short-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	VARIOUS	06/10/22	5,180.	5,484.			-304.
225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	04/25/22	06/13/22	5,901.	6,137.			-236.
126.00 ISHARES CORE MSCI EMERGING ETF	VARIOUS	06/13/22	6,168.	6,491.			-323.
135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	VARIOUS	06/13/22	7,052.	7,523.			-471.
11.00 VANGUARD SMALL CAP ETF	01/21/22	06/16/22	1,884.	2,271.			-387.
123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	03/04/22	06/16/22	5,015.	5,341.			-326.
130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	06/16/22	3,978.	4,278.			-300.
62.00 VANGUARD FTSE DEVELOPED MARKETS ETF	03/04/22	06/23/22	2,489.	2,804.			-315.
20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF	03/07/22	07/05/22	1,989.	2,316.			-327.
44.00 INVESCO FTSE RAFI US 1500 SMALL-MID	06/10/22	07/12/22	6,851.	7,133.			-282.
245.00 SCHWAB EMERGING MARKETS EQUITY ETF	06/13/22	07/14/22	5,935.	6,157.			-222.
355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF	06/13/22	07/14/22	6,100.	6,613.			-513.
177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	VARIOUS	09/07/22	4,811.	5,095.			-284.
44.00 VANGUARD GLBAL EX US REAL ESTATE ETF	05/09/22	09/20/22	1,819.	2,018.			-199.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked)			65,172.	69,661.			-4,489.

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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return	Social security number or taxpayer identification number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	06/16/22	09/22/22	3,661.	3,957.			-296.
181.00 ISHARES CORE MSCI EMERGING ETF	07/14/22	09/23/22	8,051.	8,502.			-451.
63.00 INVESCO FTSE RAFI US 1000 ETF	VARIOUS	09/23/22	8,964.	9,526.			-562.
167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	VARIOUS	09/23/22	3,904.	4,219.			-315.
153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	VARIOUS	09/23/22	6,605.	6,993.			-388.
172.00 SCHWAB INTERNATIONAL EQUITY ETF	VARIOUS	09/23/22	4,924.	5,385.			-461.
89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	VARIOUS	09/27/22	2,430.	2,775.			-345.
248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	07/14/22	09/29/22	5,808.	6,094.			-286.
145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	VARIOUS	10/12/22	5,097.	5,502.			-405.
349.00 SCHWAB EMERGING MARKETS EQUITY ETF	09/23/22	10/24/22	7,517.	8,043.			-526.
211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	10/24/22	5,816.	6,052.			-236.
WARNER BROS DISCOVERY INC COM SE 0.004	05/18/21	04/13/22	0.	0.			0.
WARNER BROS DISCOVERY INC COM SE 0.018	05/18/21	04/13/22	0.	1.	W	0.	-1.
4.539722 sh. Schwab U.S. REIT ETF Class O	08/24/21	05/09/22	102.	108.	W	1.	-5.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked)			62,879.	67,157.		1.	-4,277.

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.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **12A**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social security number or taxpayer identification number: 024-88-7197

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

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

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

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

☒ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

☐ **(C)** Short-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss)** Subtract column (e) from column (d) and combine the result with column (g).
1.177394 sh. Vanguard FTSE Emerging Markets Class O	08/24/21	03/08/22	52.	60.	W	2.	-6.
0.003339 sh. Vanguard FTSE Emerging Markets Class O	09/02/21	01/31/22	0.	0.	W	0.	0.
0.002187 sh. Vanguard FTSE Emerging Markets Class O	09/02/21	01/31/22	0.	0.	W	0.	0.
0.010515 sh. Vanguard FTSE Emerging Markets Class O	09/02/21	01/31/22	1.	1.	W	0.	0.
0.051665 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	11/16/21	09/30/22	2.	3.	W	1.	0.
0.055983 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	12/16/21	11/30/22	2.	3.	W	1.	0.
0.054301 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	01/03/22	12/30/22	2.	3.	W	1.	0.
0.005795 sh. Vanguard Mid-Cap Value ETF Class O	01/03/22	02/28/22	1.	1.	W	0.	0.
0.043410 sh. Schwab U.S. REIT ETF Class O	01/04/22	03/31/22	1.	1.	W	0.	0.
0.006642 sh. Vanguard Global ex-U.S. Real Estate ETF Class O	01/04/22	12/30/22	0.	0.	W	0.	0.
0.048733 sh. Vanguard FTSE Emerging Markets Class O	04/18/22	08/31/22	2.	2.	W	0.	0.
0.016970 sh. iShares Core S&P Total U.S. Stock Ma... Class O	06/13/22	06/30/22	1.	1.	W	0.	0.
17.128109 sh. iShares Core MSCI EAFE ETF Class O	08/30/22	09/30/22	904.	1,005.	W	1.	-100.
0.025072 sh. Vanguard REIT Index ETF Class O	09/22/22	10/31/22	2.	2.	W	0.	0.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) . .			970.	1,082.		6.	-106.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side	Social security number or taxpayer identification number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- [x] **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- [ ] **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
- [ ] **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
4.00 SCHWAB US SMALL CAP ETF	01/06/21	01/21/22	370.	370.			0.
12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	01/06/21	01/28/22	422.	429.			-7.
12.00 SCHWAB INTERNATIONAL EQUITY ETF	03/02/21	03/04/22	414.	448.			-34.
42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF	VARIOUS	03/04/22	1,276.	1,318.			-42.
25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	VARIOUS	03/07/22	876.	967.			-91.
48.00 ISHARES CALIFORNIA MUNI BOND ETF	VARIOUS	04/14/22	2,732.	2,959.			-227.
37.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	04/25/22	954.	1,015.			-61.
50.00 SCHWAB US LARGE CAP ETF	VARIOUS	04/28/22	2,498.	2,355.			143.
46.00 XTRACKERS INTER REAL ESTETF	VARIOUS	05/09/22	1,076.	1,278.			-202.
43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	VARIOUS	06/10/22	2,082.	2,252.			-170.
27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	VARIOUS	06/13/22	708.	775.			-67.
40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF	VARIOUS	06/13/22	2,090.	2,186.			-96.
57.00 VANGUARD FTSE DEVELOPED MARKETS ETF	06/05/20	06/23/22	2,289.	2,307.			-18.
106.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	07/14/22	2,568.	2,640.			-72.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked)			20,355.	21,299.			-944.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Social security number or taxpayer identification number: 024-88-7197

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
8.00 VANGUARD GLBAL EX US REAL ESTATE ETF	VARIOUS	09/20/22	331.	447.			-116.
83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF	VARIOUS	09/22/22	2,251.	2,263.			-12.
1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF	10/02/20	09/23/22	23.	28.			-5.
7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF	01/06/21	09/23/22	302.	316.			-14.
48.00 SCHWAB INTERNATIONAL EQUITY ETF	VARIOUS	09/23/22	1,374.	1,433.			-59.
1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF	12/20/18	09/27/22	27.	29.			-2.
229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF	VARIOUS	09/29/22	5,363.	5,391.			-28.
155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF	06/22/20	10/12/22	5,449.	5,447.			2.
12.00 SCHWAB EMERGING MARKETS EQUITY ETF	VARIOUS	10/24/22	258.	271.			-13.
27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF	VARIOUS	10/24/22	744.	799.			-55.
WARNER BROS DISCOVERY INC COM SE 0.3	01/24/18	04/13/22	8.	11.	W	3.	0.
WARNER BROS DISCOVERY INC COM SE 0.018	06/08/20	04/13/22	0.	1.	W	0.	-1.
WARNER BROS DISCOVERY INC COM SE 0.024	11/16/20	04/13/22	1.	1.	W	0.	0.
WARNER BROS DISCOVERY INC COM SE 0.018	01/11/21	04/13/22	0.	1.	W	0.	-1.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked)			16,131.	16,438.		3.	-304.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side	**Social security number or taxpayer identification number**
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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

Part II **Long-Term.** Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You *must* check Box D, E, *or* F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- [x] **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- [ ] **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
- [ ] **(F)** Long-term transactions not reported to you on Form 1099-B

1 **(a)** Description of property (Example: 100 sh. XYZ Co.)	**(b)** Date acquired (Mo., day, yr.)	**(c)** Date sold or disposed of (Mo., day, yr.)	**(d)** Proceeds (sales price) (see instructions)	**(e)** Cost or other basis See the **Note** below and see *Column (e)* in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions. **(f)** Code(s) from instructions	**(g)** Amount of adjustment	**(h)** Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
0.258829 sh. Vanguard FTSE Emerging Markets Class O	08/24/21	09/23/22	10.	14.	W	0.	-4.
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked)			10.	14.		0.	-4.

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

SCHEDULE 8812 (Form 1040)

Department of the Treasury
Internal Revenue Service

Credits for Qualifying Children and Other Dependents

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

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

OMB No. 1545-0074

2022

Attachment Sequence No. **47**

Name(s) shown on return	Your social security number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

Part I Child Tax Credit and Credit for Other Dependents

1	Enter the amount from line 11 of your Form 1040, 1040-SR, or 1040-NR			1	273,941.
2a	Enter income from Puerto Rico that you excluded	2a			
b	Enter the amounts from lines 45 and 50 of your Form 2555	2b	0.		
c	Enter the amount from line 15 of your Form 4563	2c			
d	Add lines 2a through 2c			2d	0.
3	Add lines 1 and 2d			3	273,941.
4	Number of qualifying children under age 17 with the required social security number	4	2		
5	Multiply line 4 by $2,000			5	4,000.
6	Number of other dependents, including any qualifying children who are not under age 17 or who do not have the required social security number	6	0		
	Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4.				
7	Multiply line 6 by $500			7	
8	Add lines 5 and 7			8	4,000.
9	Enter the amount shown below for your filing status. • Married filing jointly—$400,000 • All other filing statuses—$200,000			9	400,000.
10	Subtract line 9 from line 3. • If zero or less, enter -0-. • If more than zero and not a multiple of $1,000, enter the next multiple of $1,000. For example, if the result is $425, enter $1,000; if the result is $1,025, enter $2,000, etc.			10	0.
11	Multiply line 10 by 5% (0.05)			11	0.
12	Is the amount on line 8 more than the amount on line 11?			12	4,000.
	☐ **No. STOP.** You cannot take the child tax credit, credit for other dependents, or additional child tax credit. Skip Parts II-A and II-B. Enter -0- on lines 14 and 27. ☒ **Yes.** Subtract line 11 from line 8. Enter the result.				
13	Enter the amount from the **Credit Limit Worksheet A**			13	42,418.
14	Enter the smaller of line 12 or 13. **This is your child tax credit and credit for other dependents** **Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.**			14	4,000.

If the amount on line 12 is more than the amount on line 14, you may be able to take the **additional child tax credit** on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040, 1040-SR, or 1040-NR through line 27 (also complete Schedule 3, line 11) before completing Part II-A.

Part II-A Additional Child Tax Credit for All Filers

Caution: If you file Form 2555, you cannot claim the additional child tax credit.

15 Check this box if you **do not** want to claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27 . . . . . . ☐

16a Subtract line 14 from line 12. If zero, **stop here**; you cannot take the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27 . . . **16a** 0.

b Number of qualifying children under 17 with the required social security number: ________ x $1,500. Enter the result. If zero, **stop here**; you cannot claim the additional child tax credit. Skip Parts II-A and II-B. Enter -0- on line 27 . . . **16b**

TIP: The number of children you use for this line is the same as the number of children you used for line 4.

17 Enter the **smaller** of line 16a or line 16b . . . **17**

18a Earned income (see instructions) . . . **18a**

b Nontaxable combat pay (see instructions) . . . **18b**

19 Is the amount on line 18a more than $2,500?

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

☐ **Yes.** Subtract $2,500 from the amount on line 18a. Enter the result . . . **19**

20 Multiply the amount on line 19 by 15% (0.15) and enter the result . . . **20**

Next. On line 16b, is the amount $4,500 or more?

☐ **No.** If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the **smaller** of line 17 or line 20 on line 27.

☐ **Yes.** If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. Otherwise, go to line 21.

Part II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Residents of Puerto Rico

21 Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, see instructions . . . **21**

22 Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13 . **22**

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

24 **1040 and 1040-SR filers:** Enter the total of the amounts from Form 1040 or 1040-SR, line 27, and Schedule 3 (Form 1040), line 11.
1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11. **24**

25 Subtract line 24 from line 23. If zero or less, enter -0- . . . **25**

26 Enter the **larger** of line 20 or line 25 . . . **26**

Next, enter the **smaller** of line 17 or line 26 on line 27.

Part II-C Additional Child Tax Credit

27 **This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28** . . **27**

Form **8889**

Department of the Treasury
Internal Revenue Service

Health Savings Accounts (HSAs)

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to *www.irs.gov/Form8889* for instructions and the latest information.

OMB No. 1545-0074
2022
Attachment Sequence No. **52**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR: LEELA SESHU REDDY CHEEDEPUDI

Social security number of HSA beneficiary. If both spouses have HSAs, see instructions.: 024-88-7197

Before you begin: Complete Form 8853, Archer MSAs and Long-Term Care Insurance Contracts, if required.

Part I **HSA Contributions and Deduction.** See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part I for each spouse.

1	Check the box to indicate your coverage under a high-deductible health plan (HDHP) during 2022. See instructions	☐ Self-only ☒ Family	
2	HSA contributions you made for 2022 (or those made on your behalf), including those made by the unextended due date of your tax return that were for 2022. **Do not** include employer contributions, contributions through a cafeteria plan, or rollovers. See instructions	2	0.
3	If you were under age 55 at the end of 2022 and, on the first day of **every** month during 2022, you were, or were considered, an eligible individual with the **same** coverage, enter $3,650 ($7,300 for family coverage). **All others**, see the instructions for the amount to enter	3	7,300.
4	Enter the amount you and your employer contributed to your Archer MSAs for 2022 from Form 8853, lines 1 and 2. If you or your spouse had family coverage under an HDHP at any time during 2022, also include any amount contributed to your spouse's Archer MSAs	4	0.
5	Subtract line 4 from line 3. If zero or less, enter -0-	5	7,300.
6	Enter the amount from line 5. But if you and your spouse each have separate HSAs and had family coverage under an HDHP at any time during 2022, see the instructions for the amount to enter	6	7,300.
7	If you were age 55 or older at the end of 2022, married, and you or your spouse had family coverage under an HDHP at any time during 2022, enter your additional contribution amount. See instructions	7	
8	Add lines 6 and 7	8	7,300.
9	Employer contributions made to your HSAs for 2022 — 9		
10	Qualified HSA funding distributions — 10		
11	Add lines 9 and 10	11	
12	Subtract line 11 from line 8. If zero or less, enter -0-	12	7,300.
13	**HSA deduction.** Enter the **smaller** of line 2 or line 12 here and on Schedule 1 (Form 1040), Part II, line 13	13	0.
	Caution: If line 2 is more than line 13, you may have to pay an additional tax. See instructions.		

Part II **HSA Distributions.** If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part II for each spouse.

14a	Total distributions you received in 2022 from all HSAs (see instructions)	14a	
b	Distributions included on line 14a that you rolled over to another HSA. Also include any excess contributions (and the earnings on those excess contributions) included on line 14a that were withdrawn by the due date of your return. See instructions	14b	
c	Subtract line 14b from line 14a	14c	
15	Qualified medical expenses paid using HSA distributions (see instructions)	15	
16	**Taxable HSA distributions.** Subtract line 15 from line 14c. If zero or less, enter -0-. Also, include this amount in the total on Schedule 1 (Form 1040), Part I, line 8f	16	
17a	If any of the distributions included on line 16 meet any of the **Exceptions to the Additional 20% Tax** (see instructions), check here ☐		
b	**Additional 20% tax** (see instructions). Enter 20% (0.20) of the distributions included on line 16 that are subject to the additional 20% tax. Also, include this amount in the total on Schedule 2 (Form 1040), Part II, line 17c	17b	

Part III **Income and Additional Tax for Failure To Maintain HDHP Coverage.** See the instructions before completing this part. If you are filing jointly and both you and your spouse each have separate HSAs, complete a separate Part III for each spouse.

18	Last-month rule	18	0.
19	Qualified HSA funding distribution	19	
20	**Total income.** Add lines 18 and 19. Include this amount on Schedule 1 (Form 1040), Part I, line 8f	20	0.
21	**Additional tax.** Multiply line 20 by 10% (0.10). Include this amount in the total on Schedule 2 (Form 1040), Part II, line 17d	21	

Form **8995**

Department of the Treasury
Internal Revenue Service

Qualified Business Income Deduction Simplified Computation

Attach to your tax return.

Go to *www.irs.gov/Form8995* for instructions and the latest information.

OMB No. 1545-2294

2022

Attachment Sequence No. **55**

Name(s) shown on return	Your taxpayer identification number
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA	024-88-7197

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 $170,050 ($340,100 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			
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	158.		
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	158.		
9	REIT and PTP component. Multiply line 8 by 20% (0.20)			9	32.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9			10	32.
11	Taxable income before qualified business income deduction (see instructions)	11	248,041.		
12	Net capital gain (see instructions)	12	3,309.		
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	244,732.		
14	Income limitation. Multiply line 13 by 20% (0.20)			14	48,946.
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	32.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-			16	(0.)
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-			17	(0.)

Form **8959**

Department of the Treasury
Internal Revenue Service

Additional Medicare Tax

If any line does not apply to you, leave it blank. See separate instructions.
Attach to Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.
Go to *www.irs.gov/Form8959* for instructions and the latest information.

OMB No. 1545-0074
2022
Attachment Sequence No. 71

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	283,827.		
2	Unreported tips from Form 4137, line 6	2			
3	Wages from Form 8919, line 6	3			
4	Add lines 1 through 3	4	283,827.		
5	Enter the following amount for your filing status: Married filing jointly $250,000 Married filing separately $125,000 Single, Head of household, or Qualifying surviving spouse $200,000	5	250,000.		
6	Subtract line 5 from line 4. If zero or less, enter -0-			6	33,827.
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II			7	304.

Part II Additional Medicare Tax on Self-Employment Income

8	Self-employment income from Schedule SE (Form 1040), Part I, line 6. If you had a loss, enter -0- (Form 1040-PR or 1040-SS filers, see instructions.)	8			
9	Enter the following amount for your filing status: Married filing jointly $250,000 Married filing separately $125,000 Single, Head of household, or Qualifying surviving spouse $200,000	9			
10	Enter the amount from line 4	10			
11	Subtract line 10 from line 9. If zero or less, enter -0-	11			
12	Subtract line 11 from line 8. If zero or less, enter -0-			12	
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III			13	

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RRTA) Compensation

14	Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14			
15	Enter the following amount for your filing status: Married filing jointly $250,000 Married filing separately $125,000 Single, Head of household, or Qualifying surviving spouse $200,000	15			
16	Subtract line 15 from line 14. If zero or less, enter -0-			16	
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV			17	

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-PR or 1040-SS filers, see instructions), and go to Part V	18	304.

Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	4,116.		
20	Enter the amount from line 1	20	283,827.		
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	4,115.		
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages			22	1.
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)			23	
24	**Total Additional Medicare Tax withholding.** Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-PR or 1040-SS filers, see instructions)			24	1.

Form **8960**

Department of the Treasury
Internal Revenue Service

Net Investment Income Tax— Individuals, Estates, and Trusts

Attach to your tax return.

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

OMB No. 1545-2227

2022

Attachment Sequence No. **72**

Name(s) shown on your tax return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number or EIN: 024-88-7197

Part I Investment Income

☐ Section 6013(g) election (see instructions)
☐ Section 6013(h) election (see instructions)
☐ Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions)			1	268.
2	Ordinary dividends (see instructions)			2	4,019.
3	Annuities (see instructions)			3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a			
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b			
c	Combine lines 4a and 4b			4c	
5a	Net gain or loss from disposition of property (see instructions)	5a	-3,000.		
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b			
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c			
d	Combine lines 5a through 5c			5d	-3,000.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)			6	
7	Other modifications to investment income (see instructions)			7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7			8	1,287.

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see instructions)	9a			
b	State, local, and foreign income tax (see instructions)	9b			
c	Miscellaneous investment expenses (see instructions)	9c			
d	Add lines 9a, 9b, and 9c			9d	
10	Additional modifications (see instructions)			10	
11	Total deductions and modifications. Add lines 9d and 10			11	

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13–17. Estates and trusts, complete lines 18a–21. If zero or less, enter -0-			12	1,287.
	Individuals:				
13	Modified adjusted gross income (see instructions)	13	273,941.		
14	Threshold based on filing status (see instructions)	14	250,000.		
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	23,941.		
16	Enter the smaller of line 12 or line 15			16	1,287.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). **Enter here and include on your tax return** (see instructions)			17	49.
	Estates and Trusts:				
18a	Net investment income (line 12 above)	18a			
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b			
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-	18c			
19a	Adjusted gross income (see instructions)	19a			
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b			
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c			
20	Enter the smaller of line 18c or line 19c			20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). **Enter here and include on your tax return** (see instructions)			21	

Form **5695**

Department of the Treasury
Internal Revenue Service

Residential Energy Credits

Go to *www.irs.gov/Form5695* for instructions and the latest information.
Attach to Form 1040, 1040-SR, or 1040-NR.

OMB No. 1545-0074
2022
Attachment Sequence No. **158**

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

Part I **Residential Clean Energy Credit** (See instructions before completing this part.)

Note: Skip lines 1 through 11 if you only have a **credit carryforward from 2021**.

1	Qualified solar electric property costs	1	14,339.
2	Qualified solar water heating property costs	2	
3	Qualified small wind energy property costs	3	
4	Qualified geothermal heat pump property costs	4	
5	Qualified biomass fuel property costs	5	
6a	Add lines 1 through 5	6a	14,339.
b	Multiply line 6a by 30% (0.30)	6b	4,302.
7a	Qualified fuel cell property. Was qualified fuel cell property installed on, or in connection with, your main home located in the United States? (See instructions.)	7a	☐ Yes ☒ No

Caution: If you checked the "No" box, you cannot take a credit for qualified fuel cell property. Skip lines 7b through 11.

b Print the complete address of the main home where you installed the fuel cell property.

Number and street ______ Unit No. ______

City, State, and ZIP code ______

8	Qualified fuel cell property costs	8			
9	Multiply line 8 by 30% (0.30)	9			
10	Kilowatt capacity of property on line 8 above ______	10			
11	Enter the smaller of line 9 or line 10			11	
12	Credit carryforward from 2021. Enter the amount, if any, from your 2021 Form 5695, line 16			12	
13	Add lines 6b, 11, and 12			13	4,302.
14	Limitation based on tax liability. Enter the amount from the Residential Clean Energy Credit Limit Worksheet (see instructions)			14	45,720.
15	**Residential clean energy credit.** Enter the smaller of line 13 or line 14. Also include this amount on Schedule 3 (Form 1040), line 5			15	4,302.
16	Credit carryforward to 2023. If line 15 is less than line 13, subtract line 15 from line 13	16			

Part II Energy Efficient Home Improvement Credit

17a	Were the qualified energy efficiency improvements or residential energy property costs for your main home located in the United States? (see instructions)	**17a**	☒ Yes ☐ No
	Caution: If you checked the “No” box, you cannot claim the energy efficient home improvement credit. Do not complete Part II.		
b	Print the complete address of the main home where you made the qualifying improvements. **Caution:** You can only have one main home at a time. 1928 Everglades Dr (Number and street; Unit No.) Milpitas CA 95035-6612 (City, State, and ZIP code)		
c	Were any of these improvements related to the construction of this main home?	**17c**	☒ Yes ☐ No
	Caution: If you checked the “Yes” box, you can only claim the energy efficient home improvement credit for qualifying improvements that were not related to the construction of the home. Do not include expenses related to the construction of your main home, even if the improvements were made after you moved into the home.		
18	Lifetime limitation. Enter the amount from the Lifetime Limitation Worksheet (see instructions)	**18**	
19	Qualified energy efficiency improvements (original use must begin with you and the component must reasonably be expected to last for at least 5 years; do not include labor costs) (see instructions).		
a	Insulation material or system specifically and primarily designed to reduce heat loss or gain of your home that meets the prescriptive criteria established by the 2009 IECC	**19a**	
b	Exterior doors that meet or exceed the version 6.0 Energy Star program requirements	**19b**	
c	Metal or asphalt roof that meets or exceeds the Energy Star program requirements and has appropriate pigmented coatings or cooling granules which are specifically and primarily designed to reduce the heat gain of your home	**19c**	
d	Exterior windows and skylights that meet or exceed the version 6.0 Energy Star program requirements — **19d**		
e	Maximum amount of cost on which the credit can be figured — **19e** $2,000		
f	If you claimed window expenses on your Form 5695 prior to 2022, enter the amount from the Window Expense Worksheet (see instructions); otherwise enter -0- — **19f** 0.		
g	Subtract line 19f from line 19e. If zero or less, enter -0- — **19g** 2,000.		
h	Enter the smaller of line 19d or line 19g	**19h**	0.
20	Add lines 19a, 19b, 19c, and 19h	**20**	0.
21	Multiply line 20 by 10% (0.10)	**21**	0.
22	Residential energy property costs (must be placed in service by you; include labor costs for onsite preparation, assembly, and original installation) (see instructions).		
a	Energy-efficient building property. Do not enter more than **$300**	**22a**	0.
b	Qualified natural gas, propane, or oil furnace or hot water boiler. Do not enter more than **$150**	**22b**	0.
c	Advanced main air circulating fan used in a natural gas, propane, or oil furnace. Do not enter more than **$50**	**22c**	0.
23	Add lines 22a through 22c	**23**	0.
24	Add lines 21 and 23	**24**	0.
25	Maximum credit amount. (If you jointly occupied the home, see instructions)	**25**	500.
26	Enter the amount, if any, from line 18	**26**	
27	Subtract line 26 from line 25. If zero or less, **stop;** you cannot take the energy efficient home improvement credit	**27**	500.
28	Enter the smaller of line 24 or line 27	**28**	0.
29	Limitation based on tax liability. Enter the amount from the Energy Efficient Home Improvement Credit Limit Worksheet (see instructions)	**29**	46,720.
30	**Energy efficient home improvement credit.** Enter the smaller of line 28 or line 29. Also include this amount on Schedule 3 (Form 1040), line 5	**30**	0.

SCHEDULE D AMT

Capital Gains and Losses as Refigured for the Alternative Minimum Tax

► Keep for your records

2022

Name(s) shown on return: LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Your social security number: 024-88-7197

Part I Short-Term Capital Gains and Losses — Assets Held One Year or Less

QuickZoom to Form(s) 8949, Short-Term Gain (Loss) Transactions . . . . ►
QuickZoom to Schedule D, Short-Term Gain (Loss) Regular Tax Totals . . . . . . ►

Short-Term Totals:	Sales Price	Adjstd Basis	Gn(Ls) Adjstmt	Gain (Loss)
1 a 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	15,704.	17,149.		-1,445.
b Short-term totals from all Forms 8949 with box A checked	179,682.	193,114.	7.	-13,425.
2 Short-term totals from all Forms 8949 with box B checked				
3 Short-term totals from all Forms 8949 with box C checked				

4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824:

- **A** Form(s) 6252, Installment Sale Income . . . .
- **B** Form(s) 4684, Casualties and Thefts . . . .
- **C** Form(s) 6781, Gains and Losses from Section 1256 Contracts and Straddles . . . .
- **D** Form(s) 8824, Like-Kind Exchanges . . . .
- **E** Sale of Incentive Stock Option stock (not entered elsewhere) . . . .
- **F** Other . . . .

Total **4**

5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . **5**

6 Short-term capital loss carryover. Enter the amount, if any, from line 10 of your **Capital Loss Carryover Worksheet** **6**

7 **Net short-term capital gain or (loss).** Combine lines 1 thru 6 in column (f) . . . ► **7** -14,870.

Part II Long-Term Capital Gains and Losses — Assets Held More Than One Year

QuickZoom to Form(s) 8949, Long-Term Gain (Loss) Transactions . . . . ►
QuickZoom to Schedule D, Long-Term Gain (Loss) Regular Tax Totals . . . . . . ►

Long-Term Totals:	Sales Price	Adjstd Basis	Gn(Ls) Adjstmt	Gain (Loss)
8 a 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	13.	17.		-4.
b Long-term totals from all Forms 8949 with box D checked	36,486.	37,737.	3.	-1,248.
9 Long-term totals from all Forms 8949 with box E checked				
10 Long-term totals from all Forms 8949 with box F checked				

11	Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824: **A** Form 4797, Sales of Business Property (Gain from Pt I) . . . . ______ **B** Form(s) 6252, Installment Sale Income . . . . ______ **C** Form(s) 4684, Casualties and Thefts . . . . ______ **D** Form(s) 6781, Gains and Losses from Section 1256 Contracts and Straddles . . . . ______ **E** Form(s) 8824, Like-Kind Exchanges . . . . ______ **F** Form(s) 2439, Notice to Shareholder of Undistributed Long-Term Capital Gains . . . . ______ **G** Sale of Incentive Stock Option stock (not entered elsewhere) . . . . ______ **H** Other . . . . ______ Total	11	
12	Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	
13	Capital gain distributions	13	236.
14	Long-term capital loss carryover. Enter the amount, if any, from line 15 of your **Capital Loss Carryover Worksheet**	14	
15	**Net long-term capital gain or (loss).** Combine lines 8 thru 14 in column (f) . . ►	15	-1,016.

Part III Summary

16	Combine lines 7 and 15 and enter the result . . . . If line 16 is: • A **gain,** enter the amount on line 22 below. Then go to line 17 below. • A **loss,** skip lines 17 through 20 below. Then go to line 21. • **Zero,** skip lines 17 through 21 below and enter -0- on line 22 below.	16	-15,886.
17	Are lines 15 and 16 **both** gains? ☐ **Yes.** Go to line 18. ☐ **No.** Skip lines 18 through 21, and go to line 22.		
18	Enter the amount, if any, from line 7 of the **28% Rate Gain Worksheet**	18	0.
19	Enter the amount, if any, from line 18 of the **Unrecaptured Section 1250 Gain Worksheet**	19	0.
20	Are lines 18 and 19 **both** zero or blank? ☐ **Yes.** ☐ **No.**		
21	If line 16 is a loss, enter here and on line 22 below, the **smaller** of: • The loss on line 16, or • ($3,000), or, if married filing separately, ($1,500) . . . . **Note:** When figuring which amount is smaller, treat both amounts as positive numbers.	21	-3,000.
22	Do you have qualified dividends on Form 1040, line 9b? ☐ **Yes.** ☐ **No.** **Capital gain (loss) as refigured for the Alternative Minimum Tax.** If line 16 is a gain or zero, enter line 16. If line 16 is a loss, enter line 21. . . . . ► -3,000.		

QuickZoom to the **Qualified Dividends and Capital Gain Tax Worksheet** . . . . ►
QuickZoom to the **Schedule D Tax Worksheet** . . . . ►
QuickZoom to the **Unrecaptured Section 1250 Gain Worksheet** . . . . ►
QuickZoom to the **28% Rate Gain Gain Worksheet** . . . . ►
QuickZoom to the **Capital Loss Carryover Worksheet** . . . . ►
QuickZoom to **Form 6251, Alternative Minimum Tax** . . . . ►

Alternative Minimum Tax

Tax History Report

2022

► Keep for your records

Name(s) Shown on Return
LEELA SESHU REDDY CHEEDEPUDI & VANI YENUMULA

Five Year Tax History:

	2018	2019	2020	2021	2022
Filing status			MFJ	MFJ	MFJ
Total income			447,644.	348,709.	273,941.
Adjustments to income			2,100.		
Adjusted gross income			445,544.	348,709.	273,941.
Tax expense			10,084.	10,165.	10,000.
Interest expense			15,490.	13,643.	14,153.
Contributions			1,227.	225.	699.
Misc. deductions					
Other itemized ded'ns					
Total itemized/ standard deduction			26,801.	25,325.	25,900.
Exemption amount			0.	0.	0.
QBI deduction			17.	21.	32.
Taxable income			418,726.	323,363.	248,009.
Tax			95,868.	65,375.	46,895.
Alternative min tax					
Total credits			1,700.		8,477.
Other taxes			1,910.	1,149.	353.
Payments			80,692.	73,874.	41,116.
Form 2210 penalty			101.		
Amount owed			15,487.		
Applied to next year's estimated tax					
Refund				7,350.	2,345.
Effective tax rate %			21.14	17.60	14.02
**Tax bracket %			35.0	24.0	24.0

**Tax bracket % is based on Taxable income.

Smart Worksheets From 2022 Federal Tax Return

SMART WORKSHEET FOR: Schedule B: Interest and Dividend Income

Interest Income Smart Worksheet

Payer's Name To access Form 1099-INT **Double-Click** on payer	Box 1 Interest Income	Box 1 Typ Int	Box 2 Early Withdraw Penalty	Box 3 US Savings Bond/Treas. Obligations	Box 8 Tax-exempt Interest	Box 8 ST ID*	Box 9 Private Activity Bond
wells fargo bank	36.98						
NATIONAL FINANCIAL SERVICES LLC	0.43						
loanDepot	17.33						
BANK OF AMERICA, N.A.	24.10						
loandepot com llc	103.42						
CHARLES SCHWAB & CO., INC.	85.28						

SMART WORKSHEET FOR: Schedule B: Interest and Dividend Income

Dividend Income Smart Worksheet

Payer's Name
To access 1099-DIV, **Double-Click** from Payer

Payer's Name	Box 1a Tot Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Capital Gain Distributions	Box 2b Unrecap. Sec 1250	Box 3 Nondividend Distributions	Box 12 Exempt- int Dividends	State ID*	Private Actvty Bond
Betterment Securities	229.42	151.43	0.00	0.00	0.00			
CHARLES SCHWAB & CO., INC.	2,771.81	2,218.55	0.73			92.75	CA	0.00
NATIONAL FINANCIAL SERVICES LLC	1,017.32	939.50	234.99	5.88	1.01			

SMART WORKSHEET FOR: Form 8889: Health Savings Accounts (Taxpayer)

Line 3 Smart Worksheet

A Select your coverage for each month below. Select Family for any month you had Self-only coverage and your spouse had family coverage. Select None for for any month you were covered by Medicare.

1	January		None		Self-only		Family	7,300.
2	February		None		Self-only		Family	7,300.
3	March		None		Self-only		Family	7,300.
4	April		None		Self-only		Family	7,300.
5	May		None		Self-only		Family	7,300.
6	June		None		Self-only		Family	7,300.
7	July		None		Self-only		Family	7,300.
8	August		None		Self-only		Family	7,300.
9	September		None		Self-only		Family	7,300.
10	October		None		Self-only		Family	7,300.
11	November		None		Self-only		Family	7,300.
12	December		None		Self-only	X	Family	7,300.

B Maximum allowable contribution. . . . . 7,300.
Greater of: Sum of Lines A1 through A12 divided by 12, OR Line A12

SMART WORKSHEET FOR: Form 8889: Health Savings Accounts (Taxpayer)

Line 6 Smart Worksheet

A	Enter the amount from Line 3 which is related to Family Coverage Plan(s) and both taxpayer and spouse had HSAs during the year	0.
B	Portion of Line 5 attributed to both taxpayer and spouse having coverage under high deductible health plans and each making an HSA contribution during the year. (Line 6A minus Line 4)	0.
C	Portion of Line B amount to be carried to Line 6 of spouse's form	0.
	QuickZoom to Form 8889S ►	
D	Remainder to be carried to Line 6 (Line 5 minus Line C).	7,300.

SMART WORKSHEET FOR: Form 8889: Health Savings Accounts (Taxpayer)

Line 18 Smart Worksheet

Check here if failure to maintain HDHP coverage in 2022 was due to death or disability ☐

A	**1**	Total HSA contribution in 2021	167.
	2	Excess contribution in 2021	
	3	Net HSA contribution in 2021	167.

B Check the box below to indicate the type of coverage you had for each month of 2021. Select Family for any month that you had self only coverage and were married to a spouse with family coverage. Select None for any month you were covered by Medicare.

	Month	None	Self-only	Family	Amount
1	January			X	7,200.
2	February			X	7,200.
3	March	X			
4	April	X			
5	May	X			
6	June	X			
7	July	X			
8	August	X			
9	September	X			
10	October	X			
11	November	X			
12	December			X	7,200.

C	**1**	Total maximum allowable contribution for 2021	1,800.
	2	Amount allocated to spouse in 2021	0.
	3	Net maximum allowable contribution for 2021	1,800.

SMART WORKSHEET FOR: Form 8995: QB Income Deduction Simplified Computation

Qualified REIT dividend and PTP income Smart Worksheet

Qualified REIT dividends	158.
Qualified PTP income	

SMART WORKSHEET FOR: Form 5695: Residential Energy Credit

Residential Clean Energy Credit Smart Worksheet

Before entering your costs, see the IRS instructions for lines 1 through 8 for requirements that must be met for each property to qualify for the residential clean energy credit. Include the cost allocable to onsite preparation, assembly, or original installation of property on this smart worksheet.

* Qualified fuel cell property must be installed on or in connection with your main home in the U.S.

A	Amounts you paid for qualified solar electric property	14,339.
B	Amounts you paid for qualified solar water heating property	
C	Amounts you paid for qualified small wind energy property	
D	Amounts you paid for qualified geothermal heat pump property	
D	Amounts you paid for qualified biomass fuel property	
E	Amounts you paid for qualified fuel cell property	
F	Kilowatt capacity of property on line E	

SMART WORKSHEET FOR: Form 5695: Residential Energy Credit

Line 14 – Residential Clean Energy Credit Limit Smart Worksheet

1	Enter the amt from Form 1040, 1040-SR, or 1040-NR, line 18	46,895.
2	Enter the total, if any, of your credits from Sch 3 (Form 1040, 1040-SR, or 1040-NR) lines 1 through 4 and line 6l, and Schedule R, (Form 1040 or 1040-SR), ln 22;	175.
3	Enter the amount, if any, from Form 5695, line 30	0.
4	Nonrefundable child tax credit and credit for other dependents Form 1040, 1040-SR, or 1040-NR, line 19*	1,000.
5	Enter the amount, if any, from Form 8396, line 9	
6	Enter the amount, if any, from Form 8839, line 16	
7	Enter the amount, if any, from Form 8859, line 3	
8	Enter the amount, if any, from Form 8910, line 15	
9	Enter the amount, if any, from Form 8936, line 23	
10	Add lines 2 through 9	1,175.
11	Subtract line 10 from line 1. Also enter this amount on Form 5695, line 14. If zero or less, enter -0- on Form 5695, lines 14 and 15	45,720.

* Include the amount from Schedule 8812 (Form 1040), Credit Limit Worksheet B, line 14, instead of the amount from Form 1040, 1040-SR, or 1040-NR, line 19, if the instructions for Schedule 8812 (Form 1040) direct you to complete Credit Limit Worksheet B.

SMART WORKSHEET FOR: Form 5695: Residential Energy Credit

Energy Efficient Home Improvement Credit Limit Smart Worksheet

A	Enter the amt from Form 1040, 1040-SR, or 1040-NR, line 18	46,895.
B	Enter the total, if any, of your credits from Sch 3 (Form 1040, 1040-SR, or 1040-NR), lines 1 through 4 and negative from line 6l, and Schedule R, (Form 1040 or 1040-SR), line 22	175.
C	Subtract line 2 from line 1. Also enter this amount on Form 5695, line 29. If zero or less, **stop**; you can't take the nonbusiness energy property credit.	46,720.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

(a) Description of Short-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	(d) Date Sold	(e) Sales Price	(f) Cost or Other basis	(g) Gain or Loss Adjustment	(h) Gain or (Loss)
61.00 SCHWAB US SMALL CAP ETF		A			
VARIOUS	01/21/22	5,649.	6,155.		-506.
102.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		A			
VARIOUS	01/28/22	3,587.	3,937.		-350.
76.00 ISHARES CORE MSCI EMERGING ETF		A			
08/19/21	02/24/22	4,223.	4,604.		-381.
184.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		A			
VARIOUS	02/24/22	5,423.	5,821.		-398.
See Short-term Capital Gains and Losses					
		160,800.	172,597.	7.	-11,790.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

(a) Description of Long-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	(d) Date Sold	(e) Sales Price	(f) Cost or Other basis	(g) Gain or Loss Adjustment	(h) Gain or (Loss)
4.00 SCHWAB US SMALL CAP ETF		D			
01/06/21	01/21/22	370.	370.		0.
12.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		D			
01/06/21	01/28/22	422.	429.		-7.
12.00 SCHWAB INTERNATIONAL EQUITY ETF		D			
03/02/21	03/04/22	414.	448.		-34.
42.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		D			
VARIOUS	03/04/22	1,276.	1,318.		-42.
See Long-term Capital Gains and Losses					
		34,014.	35,186.	3.	-1,169.

Additional Information From 2022 Federal Tax Return

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

Short-term Capital Gains and Losses — Continuation Statement

(a) Description of Short-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	**(d) Date Sold**	**(e) Sales Price**	**(f) Cost or Other basis**	**(g) Gain or Loss Adjustment**	**(h) Gain or (Loss)**
134.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		A			
VARIOUS	03/04/22	4,071.	4,524.		-453.
70.00 SCHWAB INTERNATIONAL EQUITY ETF		A			
VARIOUS	03/04/22	2,415.	2,787.		-372.
43.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		A			
VARIOUS	03/07/22	1,506.	1,805.		-299.
23.00 ISHARES CALIFORNIA MUNI BOND ETF		A			
VARIOUS	04/14/22	1,309.	1,440.		-131.
257.00 INVESCO FTSE RAFI EMERGING MARKETS ETF		A			
02/24/22	04/25/22	4,953.	5,423.		-470.
191.00 SCHWAB EMERGING MARKETS EQUITY ETF		A			
VARIOUS	04/25/22	4,927.	5,365.		-438.
18.00 VANGUARD SMALL CAP ETF		A			
01/21/22	04/28/22	3,532.	3,715.		-183.
94.00 SCHWAB US LARGE CAP ETF		A			
VARIOUS	04/28/22	4,695.	4,791.		-96.
117.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		A			
01/28/22	05/06/22	3,693.	4,005.		-312.
29.00 XTRACKERS INTER REAL ESTETF		A			
VARIOUS	05/09/22	678.	842.		-164.
107.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		A			
VARIOUS	06/10/22	5,180.	5,484.		-304.
225.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		A			
04/25/22	06/13/22	5,901.	6,137.		-236.
126.00 ISHARES CORE MSCI EMERGING ETF		A			
VARIOUS	06/13/22	6,168.	6,491.		-323.
135.00 SCHWAB FUNDAMENTAL US LARGE CO ETF		A			
VARIOUS	06/13/22	7,052.	7,523.		-471.
11.00 VANGUARD SMALL CAP ETF		A			
01/21/22	06/16/22	1,884.	2,271.		-387.
123.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		A			
03/04/22	06/16/22	5,015.	5,341.		-326.
130.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		A			
VARIOUS	06/16/22	3,978.	4,278.		-300.
62.00 VANGUARD FTSE DEVELOPED MARKETS ETF		A			
03/04/22	06/23/22	2,489.	2,804.		-315.
20.00 VGRD FTSE ALL WRLD EX USSML CAP ETF		A			
03/07/22	07/05/22	1,989.	2,316.		-327.
44.00 INVESCO FTSE RAFI US 1500 SMALL-MID		A			
06/10/22	07/12/22	6,851.	7,133.		-282.
245.00 SCHWAB EMERGING MARKETS EQUITY ETF		A			
06/13/22	07/14/22	5,935.	6,157.		-222.
355.00 INVESCO FTSE RAFI EMERGING MARKETS ETF		A			
06/13/22	07/14/22	6,100.	6,613.		-513.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT
Short-term Capital Gains and Losses — Continuation Statement

(a) Description of Short-Term Property Transaction / (c) Date Acquired	(d) Date Sold	(b) Related Box on Form 8949 / (e) Sales Price	(f) Cost or Other basis	(g) Gain or Loss Adjustment	(h) Gain or (Loss)
177.00 SCHWAB FUNDAMENTAL INL LARGE COM ETF		A			
VARIOUS	09/07/22	4,811.	5,095.		-284.
44.00 VANGUARD GLBAL EX US REAL ESTATE ETF		A			
05/09/22	09/20/22	1,819.	2,018.		-199.
135.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		A			
06/16/22	09/22/22	3,661.	3,957.		-296.
181.00 ISHARES CORE MSCI EMERGING ETF		A			
07/14/22	09/23/22	8,051.	8,502.		-451.
63.00 INVESCO FTSE RAFI US 1000 ETF		A			
VARIOUS	09/23/22	8,964.	9,526.		-562.
167.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		A			
VARIOUS	09/23/22	3,904.	4,219.		-315.
153.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		A			
VARIOUS	09/23/22	6,605.	6,993.		-388.
172.00 SCHWAB INTERNATIONAL EQUITY ETF		A			
VARIOUS	09/23/22	4,924.	5,385.		-461.
89.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		A			
VARIOUS	09/27/22	2,430.	2,775.		-345.
248.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		A			
07/14/22	09/29/22	5,808.	6,094.		-286.
145.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		A			
VARIOUS	10/12/22	5,097.	5,502.		-405.
349.00 SCHWAB EMERGING MARKETS EQUITY ETF		A			
09/23/22	10/24/22	7,517.	8,043.		-526.
211.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		A			
VARIOUS	10/24/22	5,816.	6,052.		-236.
WARNER BROS DISCOVERY INC COM SE 0.004		A			
05/18/21	04/13/22	0.	0.		0.
WARNER BROS DISCOVERY INC COM SE 0.018		A			
05/18/21	04/13/22	0.	1.	0.	-1.
Betterment Securities, Summary of category A (not eligible for 8949 exception)		A			
Various	Various	1,072.	1,190.	7.	-111.
Total		160,800.	172,597.	7.	-11,790.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

Long-term Capital Gains and Losses

Continuation Statement

(a) Description of Long-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	**(d) Date Sold**	**(e) Sales Price**	**(f) Cost or Other basis**	**(g) Gain or Loss Adjustment**	**(h) Gain or (Loss)**
25.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		D			
VARIOUS	03/07/22	876.	967.		-91.
48.00 ISHARES CALIFORNIA MUNI BOND ETF		D			
VARIOUS	04/14/22	2,732.	2,959.		-227.
37.00 SCHWAB EMERGING MARKETS EQUITY ETF		D			
VARIOUS	04/25/22	954.	1,015.		-61.
50.00 SCHWAB US LARGE CAP ETF		D			
VARIOUS	04/28/22	2,498.	2,355.		143.
46.00 XTRACKERS INTER REAL ESTETF		D			
VARIOUS	05/09/22	1,076.	1,278.		-202.
43.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		D			
VARIOUS	06/10/22	2,082.	2,252.		-170.
27.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		D			
VARIOUS	06/13/22	708.	775.		-67.
40.00 SCHWAB FUNDAMENTAL US LARGE CO ETF		D			
VARIOUS	06/13/22	2,090.	2,186.		-96.
57.00 VANGUARD FTSE DEVELOPED MARKETS ETF		D			
06/05/20	06/23/22	2,289.	2,307.		-18.
106.00 SCHWAB EMERGING MARKETS EQUITY ETF		D			
VARIOUS	07/14/22	2,568.	2,640.		-72.
8.00 VANGUARD GLBAL EX US REAL ESTATE ETF		D			
VARIOUS	09/20/22	331.	447.		-116.
83.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. SMALL-MID ETF		D			
VARIOUS	09/22/22	2,251.	2,263.		-12.
1.00 INVSC CALFRNA AMT FREE MNCPL BND ETF		D			
10/02/20	09/23/22	23.	28.		-5.
7.00 SCHWAB FUNDAMENTAL US SMALL COM ETF		D			
01/06/21	09/23/22	302.	316.		-14.
48.00 SCHWAB INTERNATIONAL EQUITY ETF		D			
VARIOUS	09/23/22	1,374.	1,433.		-59.
1.00 SCHWAB INTERNATNAL SMALLCAP EQY ETF		D			
12/20/18	09/27/22	27.	29.		-2.
229.00 SCHWAB FUNDA EMG MKTS LARGE COM ETF		D			
VARIOUS	09/29/22	5,363.	5,391.		-28.
155.00 INVESCO FTSE RAFI DEVELOPED MARKETS EX-U.S. ETF		D			
06/22/20	10/12/22	5,449.	5,447.		2.
12.00 SCHWAB EMERGING MARKETS EQUITY ETF		D			
VARIOUS	10/24/22	258.	271.		-13.
27.00 SCHWAB FUNDAMENTAL INTL SMAL COM ETF		D			
VARIOUS	10/24/22	744.	799.		-55.
WARNER BROS DISCOVERY INC COM SE 0.3		D			
01/24/18	04/13/22	8.	11.	3.	0.
WARNER BROS DISCOVERY INC COM SE 0.018		D			
06/08/20	04/13/22	0.	1.	0.	-1.
WARNER BROS DISCOVERY INC COM SE 0.024		D			
11/16/20	04/13/22	1.	1.	0.	0.

SMART WORKSHEET FOR: Schedule D AMT: Capital Gains&Losses AMT

Long-term Capital Gains and Losses **Continuation Statement**

(a) Description of Long-Term Property Transaction		(b) Related Box on Form 8949			
(c) Date Acquired	**(d) Date Sold**	**(e) Sales Price**	**(f) Cost or Other basis**	**(g) Gain or Loss Adjustment**	**(h) Gain or (Loss)**
WARNER BROS DISCOVERY INC COM SE 0.018		D			
01/11/21	04/13/22	0.	1.	0.	-1.
Betterment Securities, Summary of category D (not eligible for 8949 exception)					
Various	Various	10.	14.	0.	-4.
		D			
Total		34,014.	35,186.	3.	-1,169.