

# 2020 TAX RETURN FILING INSTRUCTIONS

U.S. INDIVIDUAL INCOME TAX RETURN

**FOR THE YEAR ENDING**

December 31, 2020

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**Prepared For:**

Walid M. Osman & Doaa Hassan Abraham Hassan  
C/O Oxy, 5 Greenway Plaza Ste 110  
Houston, TX 77046

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**Prepared By:**

Deloitte Tax Services India Pvt. Ltd  
Deloitte Towers, Survey #41, Gachibowli  
Hyderabad, Telangana 500032  
India

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**Amount of Tax:**

Total tax	\$	42,022
Less: payments and credits	\$	39,970
Plus: interest and penalties	\$	0
Balance due	\$	2,052

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**Overpayment:**

Not applicable

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**Make Check Payable To:**

United States Treasury

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**Mail Tax Return and Check (if applicable) To:**

Internal Revenue Service  
ITIN Operation  
P.O. Box 149342  
Austin, TX 78714-9342

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**Return Must Be Mailed On Or Before:**

May 17, 2021

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**Special Instructions:**

The return should be signed and dated by both taxpayer and spouse.

Also enclose Form 1040-V and a check for \$2,052. Do not attach Form 1040-V or your payment to your return or to each other. Please leave Form 1040-V and your payment loose in the envelope.

**Paperwork Reduction Act Notice.**

We ask for the information on Form 1040-V to help us carry out the Internal Revenue laws of the United States. If you use Form 1040-V, you must provide the requested information. Your cooperation will help us ensure that we are collecting the right amount of tax.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Internal Revenue Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For the estimated averages, see the instructions for your income tax return. If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

010681 06-02-20

LHA  
For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. ▼ DETACH HERE ▼ Form **1040-V** (2020)

Department of the Treasury  
Internal Revenue Service

OMB No. 1545-0074  
**2020**

**Form 1040-V Payment Voucher**

- ▶ Use this voucher when making a payment with Form 1040
- ▶ Do not staple this voucher or your payment to Form 1040
- ▶ Make your check or money order payable to the "United States Treasury."
- ▶ Write your social security number (SSN) on your check or money order.

<b>Enter the amount of your payment</b> ▶	Dollars <b>2,052</b>	Cents
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1019

WALID M. OSMAN & DOAA HASSAN ABRAHEM  
C/O OXY, 5 GREENWAY PLAZA STE 110  
HOUSTON, TX 77046

P.O. BOX 149342  
AUSTIN, TX 78714-9342

**U.S. Individual Income Tax Return**

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

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

Your first name and middle initial <b>WALID M.</b>		Last name <b>OSMAN</b>	Your social security number <b>623 59 0811</b>
If joint return, spouse's first name and middle initial <b>DOAA HASSAN ABRAHEM</b>		Last name <b>HASSAN</b>	Spouse's social security number <b>697 63 1280</b>
Home address (number and street). If you have a P.O. box, see instructions. <b>C/O OXY, 5 GREENWAY PLAZA STE 110</b>			Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. <b>HOUSTON</b>		State ZIP code <b>TX 77046</b>	
Foreign country name	Foreign province/state/county	Foreign postal code	

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?  Yes  No

**Standard Deduction** Someone can claim:  You as a dependent  Your spouse as a dependent

Spouse itemizes on a separate return or you were a dual-status alien

**Age/Blindness** You:  Were born before January 2, 1956  Are blind **Spouse:**  Was born before January 2, 1956  Is blind

**Dependents** (see instructions):

If more than four dependents, see instr. and check here	(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions):	
					Child tax credit	Credit for other dependents
	<b>YOSSEF W</b>	<b>OSMAN</b>	<b>APPLIED FOR</b>	<b>SON</b>		<input checked="" type="checkbox"/>
	<b>HANA W</b>	<b>OSMAN</b>	<b>APPLIED FOR</b>	<b>DAUGHTER</b>		<input checked="" type="checkbox"/>
	<b>KENZI W</b>	<b>OSMAN</b>	<b>APPLIED FOR</b>	<b>DAUGHTER</b>		<input checked="" type="checkbox"/>

Attach Sch. B if required.	<b>1</b> Wages, salaries, tips, etc. Attach Form(s) W-2	<b>STMT 1</b>	<b>1</b>	<b>253,481.</b>
	<b>2a</b> Tax-exempt interest	<b>2a</b>	<b>2b</b> Taxable interest	<b>2b</b> 584.
	<b>3a</b> Qualified dividends	<b>3a</b>	<b>3b</b> Ordinary dividends	<b>3b</b>
	<b>4a</b> IRA distributions	<b>4a</b>	<b>4b</b> Taxable amount	<b>4b</b>
	<b>5a</b> Pensions and annuities	<b>5a</b>	<b>5b</b> Taxable amount	<b>5b</b>
	<b>6a</b> Social security benefits	<b>6a</b>	<b>6b</b> Taxable amount	<b>6b</b>
	<b>7</b> Capital gain or (loss). Attach Schedule D if required. If not required, check here		<b>7</b>	
	<b>8</b> Other income from Schedule 1, line 9		<b>8</b>	
	<b>9</b> Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b>		<b>9</b>	<b>254,065.</b>
	<b>10</b> Adjustments to income:			
	<b>a</b> From Schedule 1, line 22	<b>10a</b>		
	<b>b</b> Charitable contributions if you take the standard deduction. See instr.	<b>10b</b>		
	<b>c</b> Add lines 10a and 10b. These are your <b>total adjustments to income</b>	<b>10c</b>		
	<b>11</b> Subtract line 10c from line 9. This is your <b>adjusted gross income</b>		<b>11</b>	<b>254,065.</b>
	<b>12</b> <b>Standard deduction or itemized deductions</b> (from Schedule A)		<b>12</b>	<b>24,800.</b>
<b>13</b> Qualified business income deduction. Attach Form 8995 or Form 8995-A		<b>13</b>		
<b>14</b> Add lines 12 and 13		<b>14</b>	<b>24,800.</b>	
<b>15</b> <b>Taxable income.</b> Subtract line 14 from line 11.		<b>15</b>	<b>229,265.</b>	

If zero or less, enter -0-

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

Reissued Statement

Form W-2 Wage and Tax Statement 2020. Employer: OXY USA INC. Employee: WALID MOHAMED OSMAN. Includes boxes 1-20 for wages, taxes, and benefits.

Copy B-To Be Filed With Employee's FEDERAL Tax Return. This information is being furnished to the Internal Revenue Service. Dept. of the Treasury - IRS

Reissued Statement

Form W-2 Wage and Tax Statement 2020. Employer: OXY USA INC. Employee: WALID MOHAMED OSMAN. Includes boxes 1-20 for wages, taxes, and benefits.

Copy C-For EMPLOYEE'S RECORDS (See Notice to Employee on the back of Copy B.) OMB No. 1545-0008 Dept. of the Treasury - IRS

Reissued Statement

Form W-2 Wage and Tax Statement 2020. Employer: OXY USA INC. Employee: WALID MOHAMED OSMAN. Includes boxes 1-20 for wages, taxes, and benefits.

Copy 2-To Be Filed With Employee's State, City, or Local Income Tax Return OMB No. 1545-0008 Dept. of the Treasury - IRS

Reissued Statement

Form W-2 Wage and Tax Statement 2020. Employer: OXY USA INC. Employee: WALID MOHAMED OSMAN. Includes boxes 1-20 for wages, taxes, and benefits.

Copy 2-To Be Filed With Employee's State, City, or Local Income Tax Return OMB No. 1545-0008 Dept. of the Treasury - IRS

<b>16</b>	<b>Tax</b> (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	<b>16</b>	<b>43,183.</b>
<b>17</b>	Amount from Schedule 2, line 3	<b>17</b>	
<b>18</b>	Add lines 16 and 17	<b>18</b>	<b>43,183.</b>
<b>19</b>	Child tax credit or credit for other dependents	<b>19</b>	<b>1,500.</b>
<b>20</b>	Amount from Schedule 3, line 7	<b>20</b>	
<b>21</b>	Add lines 19 and 20	<b>21</b>	<b>1,500.</b>
<b>22</b>	Subtract line 21 from line 18. If zero or less, enter -0-	<b>22</b>	<b>41,683.</b>
<b>23</b>	Other taxes, including self-employment tax, from Schedule 2, line 10	<b>23</b>	<b>339.</b>
<b>24</b>	Add lines 22 and 23. This is your total tax	<b>24</b>	<b>42,022.</b>
<b>25</b>	Federal income tax withheld from:		
	<b>a</b> Form(s) W-2 <b>SEE STATEMENT 2</b>	<b>25a</b>	<b>39,203.</b>
	<b>b</b> Form(s) 1099	<b>25b</b>	
	<b>c</b> Other forms (see instructions) <b>SEE STATEMENT 3</b>	<b>25c</b>	<b>767.</b>
	<b>d</b> Add lines 25a through 25c	<b>25d</b>	<b>39,970.</b>
<b>26</b>	2020 estimated tax payments and amount applied from 2019 return	<b>26</b>	
<b>27</b>	Earned income credit (EIC)	<b>27</b>	
<b>28</b>	Additional child tax credit. Attach Schedule 8812	<b>28</b>	
<b>29</b>	American opportunity credit from Form 8863, line 8	<b>29</b>	
<b>30</b>	Recovery rebate credit. See instructions	<b>30</b>	
<b>31</b>	Amount from Schedule 3, line 13	<b>31</b>	
<b>32</b>	Add lines 27 through 31. These are your <b>total other payments and refundable credits</b>	<b>32</b>	
<b>33</b>	Add lines 25d, 26, and 32. These are your <b>total payments</b>	<b>33</b>	<b>39,970.</b>
<b>34</b>	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b>	<b>34</b>	
<b>35a</b>	Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here <input type="checkbox"/>	<b>35a</b>	
<b>b</b>	Routing number	<b>c</b>	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
<b>d</b>	Account number		
<b>36</b>	Amount of line 34 you want <b>applied to your 2021 estimated tax</b>	<b>36</b>	
<b>37</b>	Subtract line 33 from line 24. This is the <b>amount you owe now</b> <b>Note:</b> Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.	<b>37</b>	<b>2,052.</b>
<b>38</b>	Estimated tax penalty (see instructions)	<b>38</b>	

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

**Refund**

Direct deposit? See instructions.

**Amount You Owe**

For details on how to pay, see instructions.

**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 **MURALI KRISHNA JUJJURU** Phone no. **(408) 704-2649** Personal identification number (PIN) **69964**

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.

**Sign Here**

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		<b>PETROPHYSICAL ADVISOR</b>	
Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
		<b>HOMEMAKER</b>	

Phone no. Email address **ABUENOW@GMAIL.COM**

<b>Paid Preparer Use Only</b>	Preparer's name <b>MURALI KRISHNA JUJJURU</b>	Preparer's signature <b>MURALI KRISHNA JUJJURU</b>	Date <b>04/27/21</b>	PTIN <b>P01469964</b>	Check if: <input type="checkbox"/> Self-employed
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Firm's name <b>DELOITTE TAX SERVICES INDIA PVT. LTD</b>	Phone no. <b>(678) 299-6000</b>
Firm's address <b>DELOITTE TOWERS, SURVEY #41, GACHIBOWLI HYDERABAD, TELANGANA 500032 INDIA</b>	Firm's EIN <b>98-0432569</b>

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

**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](http://www.irs.gov/Form1040) for instructions and the latest information.**

OMB No. 1545-0074

**2020**  
Attachment  
Sequence No. **02**

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

**WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN**

Your social security number

**623-59-0811**

**Part I Tax**

<b>1</b>	Alternative minimum tax. Attach Form 6251 .....	<b>1</b>	
<b>2</b>	Excess advance premium tax credit repayment. Attach Form 8962 .....	<b>2</b>	
<b>3</b>	Add lines 1 and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17 .....	<b>3</b>	<b>0.</b>

**Part II Other Taxes**

<b>4</b>	Self-employment tax. Attach Schedule SE .....	<b>4</b>	
<b>5</b>	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919 .....	<b>5</b>	
<b>6</b>	Additional tax on IRAs, other qualified retirement plans, and other tax-favored accounts. Attach Form 5329 if required .....	<b>6</b>	
<b>7a</b>	Household employment taxes. Attach Schedule H .....	<b>7a</b>	
<b>7b</b>	Repayment of first-time homebuyer credit from Form 5405. Attach Form 5405 if required .....	<b>7b</b>	
<b>8</b>	Taxes from: a <input checked="" type="checkbox"/> Form 8959 b <input checked="" type="checkbox"/> Form 8960 c <input type="checkbox"/> Instructions; enter code(s) <b>SEE STATEMENT 4</b>	<b>8</b>	<b>339.</b>
<b>9</b>	Section 965 net tax liability installment from Form 965-A .....	<b>9</b>	
<b>10</b>	Add lines 4 through 8. These are your <b>total other taxes</b> . Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b .....	<b>10</b>	<b>339.</b>

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

Schedule 2 (Form 1040) 2020

# Underpayment of Estimated Tax by Individuals, Estates, and Trusts

▶ Go to [www.irs.gov/Form2210](http://www.irs.gov/Form2210) for instructions and the latest information.

▶ Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

Name(s) shown on tax return

**WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN**

Identifying number

**623-59-0811**

## Do You Have To File Form 2210?

Complete lines 1 through 7 below. Is line 4 or line 7 less than \$1,000?	Yes	<b>Don't file Form 2210.</b> You don't owe a penalty.
No		
Complete lines 8 and 9 below. Is line 6 equal to or more than line 9?	Yes	You <b>don't</b> owe a penalty. <b>Don't</b> file Form 2210 unless <b>box E</b> in Part II applies, then file page 1 of Form 2210.
No		
You may owe a penalty. Does any box in Part II below apply?	Yes	You <b>must</b> file Form 2210. Does box <b>B, C, or D</b> in Part II apply?
No		
<b>Don't file Form 2210.</b> You aren't required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but <b>don't file Form 2210.</b>	No	You <b>aren't</b> required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but <b>file only page 1 of Form 2210.</b>
	Yes	You must figure your penalty.

### Part I Required Annual Payment

1 Enter your 2020 tax after credits from Form 1040, 1040-SR, or 1040-NR, line 22. (See the instructions if not filing Form 1040.)	1	41,683.
2 Other taxes, including the portion of 2020 self-employment tax to which the estimated tax requirement applies and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	339.
3 Refundable credits, including the premium tax credit (see instructions)	3	( )
4 Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, <b>stop</b> ; you don't owe a penalty. <b>Don't</b> file Form 2210	4	42,022.
5 Multiply line 4 by 90% (0.90)	5	37,820.
6 Withholding taxes. <b>Don't</b> include estimated tax payments. See instructions	6	39,970.
7 Subtract line 6 from line 4. If less than \$1,000, <b>stop</b> ; you don't owe a penalty. <b>Don't</b> file Form 2210	7	2,052.
8 Maximum required annual payment based on prior year's tax (see instructions)	8	24,319.
9 <b>Required annual payment.</b> Enter the <b>smaller</b> of line 5 or line 8	9	24,319.

Next: Is line 9 more than line 6?

- No.** You **don't** owe a penalty. **Don't** file Form 2210 unless box E below applies.
- Yes.** You may owe a penalty, but **don't** file Form 2210 unless one or more boxes in Part II below applies.
- If box **B, C, or D** applies, you must figure your penalty and file Form 2210.
  - If box **A or E** applies (but not **B, C, or D**), file only page 1 of Form 2210. You **aren't** required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III or IV as a worksheet and enter your penalty on your tax return, but **file only page 1 of Form 2210.**

### Part II Reasons for Filing. Check applicable boxes. If none apply, **don't** file Form 2210.

- A**  You request a **waiver** (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you aren't required to figure your penalty.
- B**  You request a **waiver** (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C**  Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D**  Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E**  You filed or are filing a joint return for either 2019 or 2020, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you **aren't** required to figure your penalty (unless box **B, C, or D** applies).

LHA For Paperwork Reduction Act Notice, see separate instructions.

**SCHEDULE A**  
**(Form 1040)**

**DOES NOT APPLY - NOT USED**  
**Itemized Deductions**

OMB No. 1545-0074

**2020**  
Attachment  
Sequence No. **07**

Department of the Treasury  
Internal Revenue Service (99)

▶ Go to [www.irs.gov/ScheduleA](http://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.

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

Your social security number

**WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN**

**623 59 0811**

**Medical and Dental Expenses**

**Caution:** Do not include expenses reimbursed or paid by others.

<b>1</b>	Medical and dental expenses (see instructions) .....		<b>1</b>	
<b>2</b>	Enter amount from Form 1040 or 1040-SR, line 11 .....	<b>2</b>		
<b>3</b>	Multiply line 2 by 7.5% (0.075) .....		<b>3</b>	
<b>4</b>	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- .....			<b>4</b>

**Taxes You Paid**

<b>5</b>	State and local taxes.			
<b>a</b>	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 <b>SEE STATEMENT 5</b> ▶ <input checked="" type="checkbox"/>	<b>5a</b>	<b>2,372.</b>	
<b>b</b>	State and local real estate taxes (see instructions) .....	<b>5b</b>		
<b>c</b>	State and local personal property taxes .....	<b>5c</b>		
<b>d</b>	Add lines 5a through 5c .....	<b>5d</b>	<b>2,372.</b>	
<b>e</b>	Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately) .....	<b>5e</b>	<b>2,372.</b>	
<b>6</b>	Other taxes. List type and amount ▶ .....	<b>6</b>		
<b>7</b>	Add lines 5e and 6 .....			<b>7</b>

**2,372.**

**Interest You Paid**

**Caution:** Your mortgage interest deduction may be limited (see instructions).

<b>8</b>	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 .....			
<b>a</b>	Home mortgage interest and points reported to you on Form 1098. See instructions if limited .....	<b>8a</b>		
<b>b</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 ▶ .....	<b>8b</b>		
<b>c</b>	Points not reported to you on Form 1098. See instructions for special rules .....	<b>8c</b>		
<b>d</b>	Mortgage insurance premiums (see instructions) .....	<b>8d</b>		
<b>e</b>	Add lines 8a through 8d .....	<b>8e</b>		
<b>9</b>	Investment interest. Attach Form 4952 if required. See instructions .....	<b>9</b>		
<b>10</b>	Add lines 8e and 9 .....			<b>10</b>

**Gifts to Charity**

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

<b>11</b>	Gifts by cash or check. If you made any gift of \$250 or more, see instructions .....	<b>11</b>		
<b>12</b>	Other than by cash or check. If you made any gift of \$250 or more, see instructions. You <b>must</b> attach Form 8283 if over \$500 .....	<b>12</b>		
<b>13</b>	Carryover from prior year .....	<b>13</b>		
<b>14</b>	Add lines 11 through 13 .....			<b>14</b>

**Casualty and Theft Losses**

<b>15</b>	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 .....			<b>15</b>
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**Other Itemized Deductions**

<b>16</b>	Other - from list in instructions. List type and amount ▶ .....			<b>16</b>
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**Total Itemized Deductions**

<b>17</b>	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 .....	<b>17</b>	<b>2,372.</b>	
<b>18</b>	If you elect to itemize deductions even though they are less than your standard deduction, check this box .....			<input type="checkbox"/>



**SCHEDULE B**  
(Form 1040)

Department of the Treasury  
Internal Revenue Service (99)  
Name(s) shown on return

**Interest and Ordinary Dividends**

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

▶ Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

**2020**  
Attachment  
Sequence No. **08**

**WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN**

Your social security number  
**623 59 0811**

**Part I**

**Interest**

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

ADIB ABU DHABI ISLAMIC BANK

ADIB ABU DHABI ISLAMIC BANK

COMMERCIAL INTERNATIONAL BANK

ENERGY ONE FEDERAL CREDIT UNION

**Amount**

189.

10.

165.

220.

**1**

**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.

**2** Add the amounts on line 1

**3** Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815

**4** Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b ▶

584.

**2**

**3**

584.

**4**

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

**Amount**

**Part II**

**Ordinary Dividends**

**5** List name of payer ▶

**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**

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

**6**

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

**Part III**

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**

**Foreign Accounts and Trusts**

**7a** At any time during 2020, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions

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

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

**8** During 2020, 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

X

X

**Caution:** If required, failure to file FinCEN Form 114 may result in substantial penalties. See instructions.  
027501 11-05-20

# Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.  
 ▶ Go to [www.irs.gov/Form1116](http://www.irs.gov/Form1116) for instructions and the latest information.

Name **WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN** Identifying number as shown on page 1 of your tax return **623-59-0811**

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a  Section 951A category income    c  Passive category income    e  Section 901(j) income    g  Lump-sum distributions  
 b  Foreign branch category income    d  General category income    f  Certain income re-sourced by treaty

h Resident of (name of country) ▶ **UNITED STATES**

**Note:** If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to **more than one** foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I Taxable Income or Loss From Sources Outside the United States** (for category checked above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession ▶ <b>EGYPT</b>				
1a Gross income from sources within country shown above and of the type checked above: _____	364.			364.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
<b>Deductions and losses (Caution: See instructions.):</b>				
2 Expenses <b>definitely related</b> to the income on line 1a (attach statement) _____				
3 Pro rata share of other deductions <b>not definitely related:</b>				
a Certain itemized deductions or standard deduction _____	24,800.			
b Other deductions (attach statement) _____				
c Add lines 3a and 3b _____	24,800.			
d Gross foreign source income _____	364.			
e Gross income from all sources _____	254,065.			
f Divide line 3d by line 3e _____	.001432704			
g Multiply line 3c by line 3f _____	36.			
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions) _____				
b Other interest expense _____				
5 Losses from foreign sources _____				
6 Add lines 2, 3g, 4a, 4b, and 5 _____	36.			36.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				328.

**Part II Foreign Taxes Paid or Accrued**

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:				(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest		(q) Dividends	(r) Rents and royalties	(s) Interest	
A		12/31/20								
B										
C										

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 ▶ **8**

LHA For Paperwork Reduction Act Notice, see instructions.

<b>Part III Figuring the Credit</b>			
9 Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I .....	<b>9</b>		
10 Carryback or carryover (attach detailed computation) ..... (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	<b>10</b>		
11 Add lines 9 and 10 .....	<b>11</b>		
12 Reduction in foreign taxes .....	<b>12</b>		
13 Taxes reclassified under high tax kickout .....	<b>13</b>		
14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit .....	<b>14</b>		
15 Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I .....	<b>15</b>	328.	
16 Adjustments to line 15 .....	<b>16</b>		
17 Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.) .....	<b>17</b>	328.	
18 <b>Individuals:</b> Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption .....	<b>18</b>	229,265.	
<b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
19 Divide line 17 by line 18. If line 17 is more than line 18, enter "1" .....	<b>19</b>		.00143
20 <b>Individuals:</b> Enter the total of Form 1040 or 1040-SR, line 16, and Schedule 2 (Form 1040), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, line 16 and Schedule 2 (Form 1040), line 2. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 .....	<b>20</b>		43,183.
<b>Caution:</b> If you are completing line 20 for separate category <b>g</b> (lump-sum distributions), see instructions.			
21 Multiply line 20 by line 19 (maximum amount of credit) .....	<b>21</b>		62.
22 Increase in limitation (section 960(c)) .....	<b>22</b>		
23 Add lines 21 and 22 .....	<b>23</b>		62.
24 Enter the <b>smaller</b> of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV .....	<b>24</b>		
<b>Part IV Summary of Credits From Separate Parts III</b>			
25 Credit for taxes on section 951A category income .....	<b>25</b>		
26 Credit for taxes on foreign branch category income .....	<b>26</b>		
27 Credit for taxes on passive category income .....	<b>27</b>		
28 Credit for taxes on general category income .....	<b>28</b>		
29 Credit for taxes on section 901(j) income .....	<b>29</b>		
30 Credit for taxes on certain income re-sourced by treaty .....	<b>30</b>		
31 Credit for taxes on lump-sum distributions .....	<b>31</b>		
32 Add lines 25 through 31 .....	<b>32</b>		
33 Enter the <b>smaller</b> of line 20 or line 32 .....	<b>33</b>		0.
34 Reduction of credit for international boycott operations .....	<b>34</b>		
35 Subtract line 34 from line 33. This is your <b>foreign tax credit</b> . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a .....	<b>35</b>		0.

DOES NOT APPLY

Alternative Minimum Tax - Individuals

OMB No. 1545-0074

Form 6251

Department of the Treasury Internal Revenue Service (99)

Go to www.irs.gov/Form6251 for instructions and the latest information.

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

2020 Attachment Sequence No. 32

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

Your social security number

WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN

623 59 0811

Part I Alternative Minimum Taxable Income

Table with 2 columns: Description and Amount. Rows include 1 (229,265), 2a (24,800), 2b, 2c, 2d, 2e, 2f, 2g, 2h, 2i, 2j, 2k, 2l, 2m, 2n, 2o, 2p, 2q, 2r, 2s, 2t, 3, 4 (254,065).

Part II Alternative Minimum Tax (AMT)

Table with 2 columns: Description and Amount. Rows include 5 (113,400), 6 (140,665), 7 (36,573), 8, 9 (36,573), 10 (43,183), 11 (0).

**Part III Tax Computation Using Maximum Capital Gains Rates**

Complete Part III only if you are required to do so by line 7 or by the Foreign Earned Income Tax Worksheet in the instructions.

12	Enter the amount from Form 6251, line 6. If you are filing Form 2555, enter the amount from line 3 of the worksheet in the instructions for line 7 .....	12
13	Enter the amount from line 4 of the Qualified Dividends and Capital Gain Tax Worksheet in the Instructions for Forms 1040 and 1040-SR or the amount from line 13 of the Schedule D Tax Worksheet in the Instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555, see instructions for the amount to enter .....	13
14	Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555, see instructions for the amount to enter .....	14
15	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 13. Otherwise, add lines 13 and 14, and enter the <b>smaller</b> of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555, see instructions for the amount to enter .....	15
16	Enter the <b>smaller</b> of line 12 or line 15 .....	16
17	Subtract line 16 from line 12 .....	17
18	If line 17 is \$197,900 or less (\$98,950 or less if married filing separately), multiply line 17 by 26% (0.26). Otherwise, multiply line 17 by 28% (0.28) and subtract \$3,958 (\$1,979 if married filing separately) from the result .....	18
19	Enter: <ul style="list-style-type: none"> <li>• \$80,000 if married filing jointly or qualifying widow(er),</li> <li>• \$40,000 if single or married filing separately, or</li> <li>• \$53,600 if head of household.</li> </ul>	19
20	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 14 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter .....	20
21	Subtract line 20 from line 19. If zero or less, enter -0- .....	21
22	Enter the <b>smaller</b> of line 12 or line 13 .....	22
23	Enter the <b>smaller</b> of line 21 or line 22. This amount is taxed at 0% .....	23
24	Subtract line 23 from line 22 .....	24
25	Enter: <ul style="list-style-type: none"> <li>• \$441,450 if single</li> <li>• \$248,300 if married filing separately</li> <li>• \$496,600 if married filing jointly or qualifying widow(er)</li> <li>• \$469,050 if head of household</li> </ul>	25
26	Enter the amount from line 21 .....	26
27	Enter the amount from line 5 of the Qualified Dividends and Capital Gain Tax Worksheet or the amount from line 21 of the Schedule D Tax Worksheet, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040 or 1040-SR, line 15; if zero or less, enter -0-. If you are filing Form 2555, see instructions for the amount to enter .....	27
28	Add line 26 and line 27 .....	28
29	Subtract line 28 from line 25. If zero or less, enter -0- .....	29
30	Enter the smaller of line 24 or line 29 .....	30
31	Multiply line 30 by 15% (0.15) .....	31
32	Add lines 23 and 30 .....	32
<p><b>If lines 32 and 12 are the same, skip lines 33 through 37 and go to line 38. Otherwise, go to line 33.</b></p>		
33	Subtract line 32 from line 22 .....	33
34	Multiply line 33 by 20% (0.20) .....	34
<p><b>If line 14 is zero or blank, skip lines 35 through 37 and go to line 38. Otherwise, go to line 35.</b></p>		
35	Add lines 17, 32, and 33 .....	35
36	Subtract line 35 from line 12 .....	36
37	Multiply line 36 by 25% (0.25) .....	37
38	Add lines 18, 31, 34, and 37 .....	38
39	If line 12 is \$197,900 or less (\$98,950 or less if married filing separately), multiply line 12 by 26% (0.26). Otherwise, multiply line 12 by 28% (0.28) and subtract \$3,958 (\$1,979 if married filing separately) from the result .....	39
40	Enter the <b>smaller</b> of line 38 or line 39 here and on line 7. If you are filing Form 2555, do not enter this amount on line 7. Instead, enter it on line 4 of the worksheet in the instructions for line 7 .....	40

**ALTERNATIVE MINIMUM TAX  
Foreign Tax Credit**

OMB No. 1545-0121

Form **1116**

Department of the Treasury  
Internal Revenue Service (99)

(Individual, Estate, or Trust)

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

▶ Go to [www.irs.gov/Form1116](http://www.irs.gov/Form1116) for instructions and the latest information.

**2020**  
Attachment  
Sequence No. **19**

Name **WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN** Identifying number as shown on page 1 of your tax return **623-59-0811**

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a  Section 951A category income    c  Passive category income    e  Section 901(j) income    g  Lump-sum distributions  
b  Foreign branch category income    d  General category income    f  Certain income re-sourced by treaty

h Resident of (name of country) ▶ **UNITED STATES**

**Note:** If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to **more than one** foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I Taxable Income or Loss From Sources Outside the United States** (for category checked above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession ▶ <b>EGYPT</b>				
1a Gross income from sources within country shown above and of the type checked above: _____	364.			364.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
<b>Deductions and losses (Caution: See instructions.):</b>				
2 Expenses <b>definitely related</b> to the income on line 1a (attach statement) _____				
3 Pro rata share of other deductions <b>not definitely related:</b>				
a Certain itemized deductions or standard deduction _____				
b Other deductions (attach statement) _____				
c Add lines 3a and 3b _____				
d Gross foreign source income _____	364.			
e Gross income from all sources _____	254,065.			
f Divide line 3d by line 3e _____	.001432704			
g Multiply line 3c by line 3f _____				
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions) _____				
b Other interest expense _____				
5 Losses from foreign sources _____				
6 Add lines 2, 3g, 4a, 4b, and 5 _____				6
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				7 <b>364.</b>

**Part II Foreign Taxes Paid or Accrued**

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:				(p) Other foreign taxes paid or accrued	Taxes withheld at source on:			(t) Other foreign taxes paid or accrued
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest		(q) Dividends	(r) Rents and royalties	(s) Interest	
A		12/31/20								
B										
C										

8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 ▶ **8**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2020)

ALTERNATIVE MINIMUM TAX

**Part III Figuring the Credit**

<b>9</b> Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I .....	<b>9</b>		
<b>10</b> Carryback or carryover (attach detailed computation) ..... (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	<b>10</b>		
<b>11</b> Add lines 9 and 10 .....	<b>11</b>		
<b>12</b> Reduction in foreign taxes .....	<b>12</b>		
<b>13</b> Taxes reclassified under high tax kickout .....	<b>13</b>		
<b>14</b> Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit .....	<b>14</b>		
<b>15</b> Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I .....	<b>15</b>	364.	
<b>16</b> Adjustments to line 15 .....	<b>16</b>		
<b>17</b> Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.) .....	<b>17</b>	364.	
<b>18</b> <b>Individuals:</b> Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption .....	<b>18</b>	254,065.	
<b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
<b>19</b> Divide line 17 by line 18. If line 17 is more than line 18, enter "1" .....	<b>19</b>		.00143
<b>20</b> <b>Individuals:</b> Enter the total of Form 1040 or 1040-SR, line 16, and Schedule 2 (Form 1040), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, line 16 and Schedule 2 (Form 1040), line 2. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 .....	<b>20</b>		36,573.
<b>Caution:</b> If you are completing line 20 for separate category <b>g</b> (lump-sum distributions), see instructions.			
<b>21</b> Multiply line 20 by line 19 (maximum amount of credit) .....	<b>21</b>		52.
<b>22</b> Increase in limitation (section 960(c)) .....	<b>22</b>		
<b>23</b> Add lines 21 and 22 .....	<b>23</b>		52.
<b>24</b> Enter the <b>smaller</b> of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV .....	<b>24</b>		

**Part IV Summary of Credits From Separate Parts III**

<b>25</b> Credit for taxes on section 951A category income .....	<b>25</b>		
<b>26</b> Credit for taxes on foreign branch category income .....	<b>26</b>		
<b>27</b> Credit for taxes on passive category income .....	<b>27</b>		
<b>28</b> Credit for taxes on general category income .....	<b>28</b>		
<b>29</b> Credit for taxes on section 901(j) income .....	<b>29</b>		
<b>30</b> Credit for taxes on certain income re-sourced by treaty .....	<b>30</b>		
<b>31</b> Credit for taxes on lump-sum distributions .....	<b>31</b>		
<b>32</b> Add lines 25 through 31 .....	<b>32</b>		
<b>33</b> Enter the <b>smaller</b> of line 20 or line 32 .....	<b>33</b>		0.
<b>34</b> Reduction of credit for international boycott operations .....	<b>34</b>		
<b>35</b> Subtract line 34 from line 33. This is your <b>foreign tax credit</b> . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a .....	<b>35</b>		0.

## Paid Preparer's Due Diligence Checklist

Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC), Child Tax Credit (CTC) (including the Additional Child Tax Credit (ACTC) and Credit for Other Dependents (ODC)), and Head of Household (HOH) Filing Status

▶ **To be completed by preparer and filed with Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS.**  
 ▶ **Go to [www.irs.gov/Form8867](http://www.irs.gov/Form8867) for instructions and the latest information.**

Taxpayer name(s) shown on return <b>WALID M. OSMAN &amp; DOAA HASSAN ABRAHEM HASSAN</b>	Taxpayer identification number <b>623-59-0811</b>
--	--

Enter preparer's name and PTIN

**MURALI KRISHNA JUJJURU**

**P01469964**

**Part I Due Diligence Requirements**

Please check the appropriate box for the credit(s) and/or HOH filing status claimed on the return and complete the related Parts I-IV for the benefit(s) claimed (check all that apply).

EIC  
  CTC/ACTC/ODC  
  AOTC  
  HOH

	Yes	No	N/A
<b>1</b> Did you complete the return based on information for tax year 2020 provided by the taxpayer or reasonably obtained by you? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>2</b> If credits are claimed on the return, did you complete the applicable EIC and/or CTC/ACTC/ODC worksheets found in the Form 1040, 1040-SR, 1040-NR, 1040-PR, or 1040-SS instructions, and/or the AOTC worksheet found in the Form 8863 instructions, or your own worksheet(s) that provides the same information, and all related forms and schedules for each credit claimed? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>3</b> Did you satisfy the knowledge requirement? To meet the knowledge requirement, you must do both of the following. • Interview the taxpayer, ask questions, and contemporaneously document the taxpayer's responses to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status. • Review information to determine that the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of any credit(s) .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>4</b> Did any information provided by the taxpayer or a third party for use in preparing the return, or information reasonably known to you, appear to be incorrect, incomplete, or inconsistent? (If " Yes," answer questions 4a and 4b. If " No," go to question 5.) .....	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>a</b> Did you make reasonable inquiries to determine the correct, complete, and consistent information? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> Did you contemporaneously document your inquiries? (Documentation should include the questions you asked, whom you asked, when you asked, the information that was provided, and the impact the information had on your preparation of the return.) .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>5</b> Did you satisfy the record retention requirement? To meet the record retention requirement, you must keep a copy of your documentation referenced in 4b, a copy of this Form 8867, a copy of any applicable worksheet(s), a record of how, when, and from whom the information used to prepare Form 8867 and any applicable worksheet(s) was obtained, and a copy of any document(s) provided by the taxpayer that you relied on to determine eligibility for the credit(s) and/or HOH filing status or to figure the amount(s) of the credit(s) .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List those documents provided by the taxpayer, if any, that you relied on: _____ _____ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>6</b> Did you ask the taxpayer whether he/she could provide documentation to substantiate eligibility for the credit(s) and/or HOH filing status and the amount(s) of any credit(s) claimed on the return if his/her return is selected for audit? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b> Did you ask the taxpayer if any of these credits were disallowed or reduced in a previous year? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>(If credits were disallowed or reduced, go to question 7a; if not, go to question 8.)</b>			
<b>a</b> Did you complete the required recertification Form 8862? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>8</b> If the taxpayer is reporting self-employment income, did you ask questions to prepare a complete and correct Schedule C (Form 1040)? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

LHA **For Paperwork Reduction Act Notice, see separate instructions.**



**Part II Due Diligence Questions for Returns Claiming EIC** (If the return does not claim EIC, go to Part III.)

	Yes	No	N/A
9a Have you determined that the taxpayer is eligible to claim the EIC for the number of qualifying children claimed, or is eligible to claim the EIC without a qualifying child? <b>(If the taxpayer is claiming the EIC and does not have a qualifying child, go to question 10.)</b> .....	<input type="checkbox"/>	<input type="checkbox"/>	
b Did you ask the taxpayer if the child lived with the taxpayer for over half of the year, even if the taxpayer has supported the child the entire year? .....	<input type="checkbox"/>	<input type="checkbox"/>	
c Did you explain to the taxpayer the rules about claiming the EIC when a child is the qualifying child of more than one person (tiebreaker rules)? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Part III Due Diligence Questions for Returns Claiming CTC/ACTC/ODC** (If the return does not claim CTC, ACTC, or ODC, go to Part IV.)

	Yes	No	N/A
10 Have you determined that each qualifying person for the CTC/ACTC/ODC is the taxpayer's dependent who is a citizen, national, or resident of the United States? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
11 Did you explain to the taxpayer that he/she may not claim the CTC/ACTC if the taxpayer has not lived with the child for over half of the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to exemption for the child? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you explain to the taxpayer the rules about claiming the CTC/ACTC/ODC for a child of divorced or separated parents (or parents who live apart), including any requirement to attach a Form 8332 or similar statement to the return? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Part IV Due Diligence Questions for Returns Claiming AOTC** (If the return does not claim AOTC, go to Part V.)

	Yes	No
13 Did the taxpayer provide substantiation for the credit, such as a Form 1098-T and/or receipts for the qualified tuition and related expenses for the claimed AOTC? .....	<input type="checkbox"/>	<input type="checkbox"/>

**Part V Due Diligence Questions for Claiming HOH** (If the return does not claim HOH filing status, go to Part VI.)

	Yes	No
14 Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax year and provided more than half of the cost of keeping up a home for the year for a qualifying person? .....	<input type="checkbox"/>	<input type="checkbox"/>

**Part VI Eligibility Certification**

► You will have complied with all due diligence requirements for claiming the applicable credit(s) and/or HOH filing status on the return of the taxpayer identified above if you:

- A. Interview the taxpayer, ask adequate questions, contemporaneously document the taxpayer's responses on the return or in your notes, review adequate information to determine if the taxpayer is eligible to claim the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s);
- B. Complete this Form 8867 truthfully and accurately and complete the actions described in this checklist for any applicable credit(s) claimed and HOH filing status, if claimed;
- C. Submit Form 8867 in the manner required; **and**
- D. Keep all five of the following records for 3 years from the latest of the dates specified in the Form 8867 instructions under *Document Retention*.
  1. A copy of this Form 8867.
  2. The applicable worksheet(s) or your own worksheet(s) for any credit(s) claimed.
  3. Copies of any documents provided by the taxpayer on which you relied to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).
  4. A record of how, when, and from whom the information used to prepare this form and the applicable worksheet(s) was obtained.
  5. A record of any additional information you relied upon, including questions you asked and the taxpayer's responses, to determine the taxpayer's eligibility for the credit(s) and/or HOH filing status and to figure the amount(s) of the credit(s).

► If you have not complied with all due diligence requirements, you may have to pay a \$540 penalty for each failure to comply related to a claim of an applicable credit or HOH filing status.

15 Do you certify that all of the answers on this Form 8867 are, to the best of your knowledge, true, correct, and complete? .....	Yes	No
	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Additional Medicare Tax

# 2020

Attachment  
Sequence No. **71**

- ▶ 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](http://www.irs.gov/Form8959) for instructions and the latest information.

Name(s) shown on return <b>WALID M. OSMAN &amp; DOAA HASSAN ABRAHEM HASSAN</b>	Your social security number <b>623-59-0811</b>
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### 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 .....	<b>1</b>	285,223.		
2 Unreported tips from Form 4137, line 6 .....	<b>2</b>			
3 Wages from Form 8919, line 6 .....	<b>3</b>			
4 Add lines 1 through 3 .....	<b>4</b>	285,223.		
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 widow(er) ..... \$200,000	<b>5</b>	250,000.		
6 Subtract line 5 from line 4. If zero or less, enter -0- .....	<b>6</b>			35,223.
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II .....	<b>7</b>			317.

### 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.) .....	<b>8</b>			
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 widow(er) ..... \$200,000	<b>9</b>			
10 Enter the amount from line 4 .....	<b>10</b>			
11 Subtract line 10 from line 9. If zero or less, enter -0- .....	<b>11</b>			
12 Subtract line 11 from line 8. If zero or less, enter -0- .....	<b>12</b>			
13 Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III .....	<b>13</b>			

### 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) .....	<b>14</b>			
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 widow(er) ..... \$200,000	<b>15</b>			
16 Subtract line 15 from line 14. If zero or less, enter -0- .....	<b>16</b>			
17 Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV .....	<b>17</b>			

### Part IV Total Additional Medicare Tax

18 Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 8 (check box a) (Form 1040-PR or 1040-SS filers, see instructions), and go to Part V .....	<b>18</b>			317.
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### 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 .....	<b>19</b>	4,903.		
20 Enter the amount from line 1 .....	<b>20</b>	285,223.		
21 Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages .....	<b>21</b>	4,136.		
22 Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages .....	<b>22</b>			767.
23 Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions) .....	<b>23</b>			
24 <b>Total Additional Medicare Tax withholding.</b> 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) .....	<b>24</b>			767.

# Net Investment Income Tax - Individuals, Estates, and Trusts

## 2020

Department of the Treasury  
Internal Revenue Service (99)

▶ **Attach to your tax return.**

▶ **Go to [www.irs.gov/Form8960](http://www.irs.gov/Form8960) for instructions and the latest information.**

Attachment  
Sequence No. **72**

Name(s) shown on your tax return <b>WALID M. OSMAN &amp; DOAA HASSAN ABRAHEM HASSAN</b>	Your social security number or EIN <b>623-59-0811</b>
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**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) .....		<b>1</b>	584.
2 Ordinary dividends (see instructions) .....		<b>2</b>	
3 Annuities (see instructions) .....		<b>3</b>	
4a Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions) .....	<b>4a</b>		
b Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions) .....	<b>4b</b>		
c Combine lines 4a and 4b .....		<b>4c</b>	
5a Net gain or loss from disposition of property (see instructions) .....	<b>5a</b>		
b Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions) .....	<b>5b</b>		
c Adjustment from disposition of partnership interest or S corporation stock (see instructions) .....	<b>5c</b>		
d Combine lines 5a through 5c .....		<b>5d</b>	
6 Adjustments to investment income for certain CFCs and PFICs (see instructions) .....		<b>6</b>	
7 Other modifications to investment income (see instructions) .....		<b>7</b>	
8 Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7 .....		<b>8</b>	584.

**Part II Investment Expenses Allocable to Investment Income and Modifications**

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

**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- .....		<b>12</b>	584.
<b>Individuals:</b>			
13 Modified adjusted gross income (see instructions) .....	<b>13</b>	254,065.	
14 Threshold based on filing status (see instructions) .....	<b>14</b>	250,000.	
15 Subtract line 14 from line 13. If zero or less, enter -0- .....	<b>15</b>	4,065.	
16 Enter the smaller of line 12 or line 15 .....		<b>16</b>	584.
17 Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). <b>Enter here and include on your tax return</b> (see instructions) .....		<b>17</b>	22.
<b>Estates and Trusts:</b>			
18a Net investment income (line 12 above) .....	<b>18a</b>		
b Deductions for distributions of net investment income and deductions under section 642(c) (see instructions) .....	<b>18b</b>		
c Undistributed net investment income. Subtract line 18b from 18a (see instructions). If zero or less, enter -0- .....	<b>18c</b>		
19a Adjusted gross income (see instructions) .....	<b>19a</b>		
b Highest tax bracket for estates and trusts for the year (see instructions) .....	<b>19b</b>		
c Subtract line 19b from line 19a. If zero or less, enter -0- .....	<b>19c</b>		
20 Enter the smaller of line 18c or line 19c .....		<b>20</b>	
21 Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). <b>Enter here and include on your tax return</b> (see instructions) .....		<b>21</b>	

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

# Preparer Explanation for Not Filing Electronically

Department of the Treasury  
Internal Revenue Service

▶ Go to [www.irs.gov/Form8948](http://www.irs.gov/Form8948) for instructions and the latest information.

Attachment  
Sequence No. **173**

Name(s) on tax return <b>WALID M. OSMAN &amp; DOAA HASSAN ABRAHEM HASSAN</b>	Tax year of return <b>2020</b>	Taxpayer's identifying number <b>623-59-0811</b>
Preparer's name <b>MURALI KRISHNA JUJJURU</b>	Preparer Tax Identification Number (PTIN) <b>P01469964</b>	

**Three out of four taxpayers now use IRS e-file. Go to [www.irs.gov/efile](http://www.irs.gov/efile) for details on using IRS e-file. The benefits of electronic filing include the following.**

- Faster refunds
- Secure transmissions
- E-payment options
- More accurate returns
- Easier filing method
- Receipt acknowledged

Check the applicable box to indicate the reason this return is not being filed electronically. Do not check more than one box.

- 1  Taxpayer chose to file this return on paper.
- 2  The preparer received a waiver from the requirement to electronically file the tax return.  
Waiver Reference Number \_\_\_\_\_ Approval Letter Date \_\_\_\_\_
- 3  The preparer is a member of a recognized religious group that is conscientiously opposed to filing electronically.
- 4  This return was rejected by IRS *e-file* and the reject condition could not be resolved.  
Reject code: \_\_\_\_\_ Number of attempts to resolve reject: \_\_\_\_\_
- 5  The preparer's e-file software package does not support Form \_\_\_\_\_ or Schedule \_\_\_\_\_ attached to this return.
- 6 Check the box that applies and provide additional information if requested.
  - a  The preparer is ineligible to file electronically because IRS *e-file* does not accept foreign preparers without social security numbers who live and work abroad.
  - b  The preparer is ineligible to participate in IRS *e-file*.
  - c  Other: Describe below the circumstances that prevented the preparer from filing this return electronically.

THE TAXPAYER MEETS ONE OF EXCEPTIONS FOR MANDATORY E-FILING. THE RETURN  
CANNOT BE ELECTRONICALLY FILED AS THE DEPENDENTS ARE APPLYING FOR ITIN.

**Statement of Specified Foreign Financial Assets**

▶ Go to [www.irs.gov/Form8938](http://www.irs.gov/Form8938) for instructions and the latest information.  
▶ Attach to your tax return.

For calendar year **2020** or tax year beginning and ending

If you have attached continuation statements, check here  Number of continuation statements **1**

**1** Name(s) shown on return  
**WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN**

**2** Taxpayer identification number (TIN)  
**623-59-0811**

**3** Type of filer  
**a**  Specified individual **b**  Partnership **c**  Corporation **d**  Trust

**4** If you checked box 3a, skip this line 4. If you checked box 3b or 3c, enter the name and TIN of the specified individual who closely holds the partnership or corporation. If you checked box 3d, enter the name and TIN of the specified person who is a current beneficiary of the trust. (See instructions for definitions and what to do if you have more than one specified individual or specified person to list.)

**a** Name **b** TIN

**Part I Foreign Deposit and Custodial Accounts Summary**

<b>1</b> Number of deposit accounts (reported in Part V)	4
<b>2</b> Maximum value of all deposit accounts	\$ 131,422.
<b>3</b> Number of custodial accounts (reported in Part V)	▶
<b>4</b> Maximum value of all custodial accounts	\$
<b>5</b> Were any foreign deposit or custodial accounts closed during the tax year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

**Part II Other Foreign Assets Summary**

<b>1</b> Number of foreign assets (reported in Part VI)	▶
<b>2</b> Maximum value of all assets (reported in Part VI)	\$
<b>3</b> Were any foreign assets acquired or sold during the tax year?	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Part III Summary of Tax Items Attributable to Specified Foreign Financial Assets (see instructions)**

(a) Asset category	(b) Tax item	(c) Amount reported on form or schedule	Where reported	
			(d) Form and line	(e) Schedule and line
1 Foreign deposit and custodial accounts	<b>a</b> Interest	\$ 364.	STATEMENT 7	
	<b>b</b> Dividends	\$		
	<b>c</b> Royalties	\$		
	<b>d</b> Other income	\$		
	<b>e</b> Gains (losses)	\$		
	<b>f</b> Deductions	\$		
	<b>g</b> Credits	\$		
2 Other foreign assets	<b>a</b> Interest	\$		
	<b>b</b> Dividends	\$		
	<b>c</b> Royalties	\$		
	<b>d</b> Other income	\$		
	<b>e</b> Gains (losses)	\$		
	<b>f</b> Deductions	\$		
	<b>g</b> Credits	\$		

**Part IV Excepted Specified Foreign Financial Assets (see instructions)**

If you reported specified foreign financial assets on one or more of the following forms, enter the number of such forms filed. You do not need to include these assets on Form 8938 for the tax year.

1. Number of Forms 3520 \_\_\_\_\_ 2. Number of Forms 3520-A \_\_\_\_\_ 3. Number of Forms 5471 \_\_\_\_\_  
4. Number of Forms 8621 \_\_\_\_\_ 5. Number of Forms 8865 \_\_\_\_\_

**Part V Detailed Information for Each Foreign Deposit and Custodial Account Included in the Part I Summary (see instructions)**

If you have more than one account to report in Part V, attach a continuation statement for each additional account. See instructions.

**1** Type of account  Deposit  Custodial **2** Account number or other designation  
**200000428678**

**3** Check all that apply **a**  Account opened during tax year **b**  Account closed during tax year  
**c**  Account jointly owned with spouse **d**  No tax item reported in Part III with respect to this asset

**4** Maximum value of account during tax year \$ **1,500.**

**5** Did you use a foreign currency exchange rate to convert the value of the account into U.S. dollars?  Yes  No

**6** If you answered "Yes" to line 5, complete all that apply.  
**(a)** Foreign currency in which account is maintained **EGYPT, POUND**  
**(b)** Foreign currency exchange rate used to convert to U.S. dollars **15.69000000**  
**(c)** Source of exchange rate used if not from U.S. Treasury Department's Bureau of the Fiscal Service

Part V Detailed Information for Each Foreign Deposit and Custodial Account Included in the Part I Summary

(see instructions) (continued)

7a Name of financial institution in which account is maintained ADIB ABU DHABI ISLAMIC BANK

b Global Intermediary Identification Number (GIIN) (Optional)

8 Mailing address of financial institution in which account is maintained. Number, street, and room or suite no. AI OPRA SQ. GHAYT AI ADAH, ABDEEN

9 City or town, state or province, and country (including postal code) CAIRO EGYPT

Part VI Detailed Information for Each "Other Foreign Asset" Included in the Part II Summary (see instructions)

If you have more than one asset to report in Part VI, attach a continuation statement for each additional asset. See instructions.

1 Description of asset 2 Identifying number or other designation

3 Complete all that apply. See instructions for reporting of multiple acquisition or disposition dates.

a Date asset acquired during tax year, if applicable

b Date asset disposed of during tax year, if applicable

c Check if asset jointly owned with spouse d Check if no tax item reported in Part III with respect to this asset

4 Maximum value of asset during tax year (check box that applies)

a \$0 - \$50,000 b \$50,001 - \$100,000 c \$100,001 - \$150,000 d \$150,001 - \$200,000

e If more than \$200,000, list value \$

5 Did you use a foreign currency exchange rate to convert the value of the asset into U.S. dollars? Yes No

6 If you answered "Yes" to line 5, complete all that apply.

(a) Foreign currency in which asset is denominated (b) Foreign currency exchange rate used to convert to U.S. dollars (c) Source of exchange rate used if not from U.S. Treasury Department's Bureau of the Fiscal Service

7 If asset reported on line 1 is stock of a foreign entity or an interest in a foreign entity, enter the following information for the asset.

a Name of foreign entity b GIIN (Optional)

c Type of foreign entity (1) Partnership (2) Corporation (3) Trust (4) Estate

d Mailing address of foreign entity. Number, street, and room or suite no.

e City or town, state or province, and country (including postal code)

8 If asset reported on line 1 is not stock of a foreign entity or an interest in a foreign entity, enter the following information for the asset.

Note: If this asset has more than one issuer or counterparty, attach a continuation statement with the same information for each additional issuer or counterparty. See instructions.

a Name of issuer or counterparty Check if information is for Issuer Counterparty

b Type of issuer or counterparty (1) Individual (2) Partnership (3) Corporation (4) Trust (5) Estate

c Check if issuer or counterparty is a U.S. person Foreign person

d Mailing address of issuer or counterparty. Number, street, and room or suite no.

e City or town, state or province, and country (including postal code)

**WALID M. OSMAN & DOAA HASSAN ABRAHEM HAS**

**623-59-0811**

**Part V Foreign Deposit and Custodial Accounts** (see instructions)

<b>1</b> Type of account <input checked="" type="checkbox"/> Deposit <input type="checkbox"/> Custodial	<b>2</b> Account number or other designation <b>200000428679</b>
---	---

<b>3</b> Check all that apply <b>a</b> <input type="checkbox"/> Account opened during tax year <b>b</b> <input type="checkbox"/> Account closed during tax year <b>c</b> <input type="checkbox"/> Account jointly owned with spouse <b>d</b> <input type="checkbox"/> No tax item reported in Part III with respect to this asset
--

<b>4</b> Maximum value of account during tax year ..... \$	<b>6,565.</b>
--	---------------

<b>5</b> Did you use a foreign currency exchange rate to convert the value of the account into U.S. dollars? .....	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--	---

<b>6</b> If you answered "Yes" to line 5, complete all that apply.		
<b>(1)</b> Foreign currency in which account is maintained <b>EGYPT, POUND</b>	<b>(2)</b> Foreign currency exchange rate used to convert to U.S. dollars <b>15.69000000</b>	<b>(3)</b> Source of exchange rate used if not from U.S. Treasury Department's Bureau of the Fiscal Service

<b>7a</b> Name of financial institution in which account is maintained <b>ADIB ABU DHABI ISLAMIC BANK</b>	<b>b</b> Global Intermediary Identification Number (GIIN) (Optional)
--	--

**8** Mailing address of financial institution in which account is maintained. Number, street, and room or suite no.

**AI OPRA SQ. GHAYT AI ADAH, ABDEEN**

**9** City or town, province or state, and country (including postal code)

**CAIRO EGYPT**

<b>1</b> Type of account <input checked="" type="checkbox"/> Deposit <input type="checkbox"/> Custodial	<b>2</b> Account number or other designation <b>100036211568</b>
---	---

<b>3</b> Check all that apply <b>a</b> <input type="checkbox"/> Account opened during tax year <b>b</b> <input type="checkbox"/> Account closed during tax year <b>c</b> <input type="checkbox"/> Account jointly owned with spouse <b>d</b> <input checked="" type="checkbox"/> No tax item reported in Part III with respect to this asset
---

<b>4</b> Maximum value of account during tax year ..... \$	<b>50,327.</b>
--	----------------

<b>5</b> Did you use a foreign currency exchange rate to convert the value of the account into U.S. dollars? .....	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--	---

<b>6</b> If you answered "Yes" to line 5, complete all that apply.		
<b>(1)</b> Foreign currency in which account is maintained <b>EGYPT, POUND</b>	<b>(2)</b> Foreign currency exchange rate used to convert to U.S. dollars <b>15.69000000</b>	<b>(3)</b> Source of exchange rate used if not from U.S. Treasury Department's Bureau of the Fiscal Service

<b>7a</b> Name of financial institution in which account is maintained <b>COMMERCIAL INTERNATIONAL BANK</b>	<b>b</b> Global Intermediary Identification Number (GIIN) (Optional)
--	--

**8** Mailing address of financial institution in which account is maintained. Number, street, and room or suite no.

**WALI AL AHD, EI-QOBBA, HADA'IQ EI QOBBAH**

**9** City or town, province or state, and country (including postal code)

**CAIRO EGYPT**

<b>1</b> Type of account <input checked="" type="checkbox"/> Deposit <input type="checkbox"/> Custodial	<b>2</b> Account number or other designation <b>100018198481</b>
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<b>3</b> Check all that apply <b>a</b> <input type="checkbox"/> Account opened during tax year <b>b</b> <input type="checkbox"/> Account closed during tax year <b>c</b> <input type="checkbox"/> Account jointly owned with spouse <b>d</b> <input type="checkbox"/> No tax item reported in Part III with respect to this asset
--

<b>4</b> Maximum value of account during tax year ..... \$	<b>73,030.</b>
--	----------------

<b>5</b> Did you use a foreign currency exchange rate to convert the value of the account into U.S. dollars? .....	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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<b>6</b> If you answered "Yes" to line 5, complete all that apply.		
<b>(1)</b> Foreign currency in which account is maintained <b>EGYPT, POUND</b>	<b>(2)</b> Foreign currency exchange rate used to convert to U.S. dollars <b>15.69000000</b>	<b>(3)</b> Source of exchange rate used if not from U.S. Treasury Department's Bureau of the Fiscal Service

<b>7a</b> Name of financial institution in which account is maintained <b>COMMERCIAL INTERNATIONAL BANK</b>	<b>b</b> Global Intermediary Identification Number (GIIN) (Optional)
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**8** Mailing address of financial institution in which account is maintained. Number, street, and room or suite no.

**WALI AL AHD, EI-QOBBA, HADA'IQ EI QOBBAH**

**9** City or town, province or state, and country (including postal code)

**CAIRO EGYPT**

## Form 1116

## U.S. and Foreign Source Income Summary

NAME			
WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN			623-59-0811
INCOME TYPE	TOTAL	U.S.	FOREIGN PASSIVE
Compensation	253,481.	253,481.	
Dividends/Distributions			
Interest	SEE STATEMENT 8 584.	220.	364.
Capital Gains			
Business/Profession			
Rent/Royalty			
State/Local Refunds			
Partnership/S Corporation			
Trust/Estate			
Other Income			
Gross Income	<u>254,065.</u>	<u>253,701.</u>	<u>364.</u>
Less:			
Section 911 Exclusion			
Capital Losses			
Capital Gains Tax Adjustment			
Total Income - Form 1116	<u>254,065.</u>	<u>253,701.</u>	<u>364.</u>
Deductions:			
Business/Profession Expenses			
Rent/Royalty Expenses			
Partnership/S Corporation Losses			
Trust/Estate Losses			
Capital Losses			
Non-capital Losses			
Individual Retirement Account			
Moving Expenses			
Self-employment Tax Deduction			
Self-employment Health Insurance			
Keogh Contributions			
Alimony			
Forfeited Interest			
Foreign Housing Deduction			
Charitable Deduction if taking Standard Deduction			
Other Adjustments			
Capital Gains Tax Adjustment			
Total Deductions	<u>                    </u>	<u>                    </u>	<u>                    </u>
Adjusted Gross Income	<u>254,065.</u>	<u>253,701.</u>	<u>364.</u>
Less Itemized Deductions:			
Specifically Allocated			
Home Mortgage Interest			
Other Interest			
Ratably Allocated	24,800.	24,764.	36.
Total Adjustments to Adjusted Gross Income	<u>24,800.</u>	<u>24,764.</u>	<u>36.</u>
Taxable Income	<u>229,265.</u>	<u>228,937.</u>	<u>328.</u>



NAME

WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN

623-59-0811

Foreign Income Category

PASSIVE INCOME

Regular	2015	2016	2017	2018	2019	2020
1. Foreign tax paid/accrued						
2. FTC carryback to 2020 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						
5. Maximum credit allowable						62.
6. Unused foreign tax ( + ) or excess of limit ( - )						-62.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining						-62.
Total foreign taxes from all available years to be carried to next year						

	2010	2011	2012	2013	2014
1. Foreign tax paid/accrued					
2. FTC carryback to 2020 for amended returns					
3. Reduction in foreign taxes					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax ( + ) or excess of limit ( - )					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Foreign tax or excess limit remaining					

NAME

WALID M. OSMAN & DOAA HASSAN ABRAHEM HASSAN

623-59-0811

Foreign Income Category

PASSIVE INCOME

AMT	2015	2016	2017	2018	2019	2020
1. Foreign tax paid/accrued						
2. FTC carryback to 2020 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						
5. Maximum credit allowable						52.
6. Unused foreign tax ( + ) or excess of limit ( - )						-52.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining						-52.
Total foreign taxes from all available years to be carried to next year						

	2010	2011	2012	2013	2014
1. Foreign tax paid/accrued					
2. FTC carryback to 2020 for amended returns					
3. Reduction in foreign taxes					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax ( + ) or excess of limit ( - )					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Foreign tax or excess limit remaining					

FORM 1040	WAGES RECEIVED AND TAXES WITHHELD				STATEMENT 1	
T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T OXY USA INC.	253,481.	39,203.			8,537.	4,903.
TOTALS	253,481.	39,203.			8,537.	4,903.

FORM 1040	FEDERAL INCOME TAX WITHHELD - FORM(S) W-2	STATEMENT 2
T S DESCRIPTION		AMOUNT
T OXY USA INC.		39,203.
TOTAL TO FORM 1040, LINE 25A		39,203.

FORM 1040	FEDERAL INCOME TAX WITHHELD - OTHER FORMS	STATEMENT 3
T S DESCRIPTION		AMOUNT
FORM 8959, LINE 24		767.
TOTAL TO FORM 1040, LINE 25C		767.

SCHEDULE 2	OTHER TAXES	STATEMENT 4
DESCRIPTION		AMOUNT
FROM FORM 8959		317.
FROM FORM 8960		22.
TOTAL TO SCHEDULE 2, LINE 8		339.

SCHEDULE A

STATE AND LOCAL GENERAL SALES TAXES

STATEMENT 5

DESCRIPTIONAMOUNT

STATE SALES TAX

1,797.

LOCAL SALES TAX

575.

TOTAL TO SCHEDULE A, LINE 5A

2,372.

## SCHEDULE A

## GENERAL SALES TAX DEDUCTION WORKSHEET

## STATEMENT 6

1	ENTER YOUR STATE GENERAL SALES TAXES FROM THE APPLICABLE TABLE. TEXAS IF, FOR ALL OF 2020, YOU LIVED ONLY IN CONNECTICUT, THE DISTRICT OF COLUMBIA, INDIANA, KENTUCKY, MAINE, MARYLAND, MASSACHUSETTS, MICHIGAN, NEW JERSEY, OR RHODE ISLAND, SKIP LINES 2 THROUGH 5, ENTER -0- ON LINE 6, AND GO TO LINE 7. OTHERWISE, GO TO LINE 2.	1,797.
2	DID YOU LIVE IN ALASKA, ARIZONA, ARKANSAS, COLORADO, GEORGIA, ILLINOIS, LOUISIANA, MISSISSIPPI, MISSOURI, NEW YORK, NORTH CAROLINA, SOUTH CAROLINA, TENNESSEE, UTAH, OR VIRGINIA IN 2020? IF NO, ENTER -0-. IF YES, ENTER YOUR LOCAL GENERAL SALES TAXES FROM THE APPLICABLE TABLE.	0.
3	DID YOUR LOCALITY IMPOSE A LOCAL GENERAL SALES TAX IN 2020? RESIDENTS OF CALIFORNIA AND NEVADA SEE INSTRUCTIONS. IF NO, SKIP LINES 3 THROUGH 5, ENTER -0- ON LINE 6 AND GO TO LINE 7. IF YES, ENTER YOUR LOCAL GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN. HOUSTON	2.0000
4	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, SKIP LINES 4 AND 5 AND GO TO LINE 6. IF YES, ENTER YOUR STATE GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	6.2500
5	DIVIDE LINE 3 BY LINE 4. ENTER THE RESULT AS A DECIMAL (ROUNDED TO AT LEAST THREE PLACES).	.3200
6	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, MULTIPLY LINE 2 BY LINE 3. IF YES, MULTIPLY LINE 1 BY LINE 5.	575.
6A	ADD LINE 1 AND LINE 6.	<u>2,372.</u>
6B	PART-YEAR DAYS RATE.	1.000000
6C	MULTIPLY LINE 6A BY LINE 6B.	<u>2,372.</u>
7	ENTER YOUR GENERAL SALES TAXES PAID ON SPECIFIED ITEMS, IF ANY.	
8	DEDUCTION FOR GENERAL SALES TAXES. ADD LINES 6C AND 7. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 5A AND CHECK BOX.	<u>2,372.</u>

FORM 8938

FOREIGN DEPOSIT AND CUSTODIAL ACCOUNTS

STATEMENT 7

<u>INTEREST DESCRIPTION</u>	<u>AMOUNT</u>	<u>FORM AND LINE</u>	<u>SCH AND LINE</u>
ADIB ABU DHABI ISLAMIC BANK	189.		SCH B, LN 1
ADIB ABU DHABI ISLAMIC BANK	10.		SCH B, LN 1
COMMERCIAL INTERNATIONAL BANK	165.		SCH B, LN 1
TOTAL	364.		

FORM 1116

U.S. AND FOREIGN SOURCE INCOME SUMMARY  
FOREIGN INTEREST INCOME

STATEMENT 8

<u>DESCRIPTION</u>	<u>AMOUNT</u>
ADIB ABU DHABI ISLAMIC BANK	189.
ADIB ABU DHABI ISLAMIC BANK	10.
COMMERCIAL INTERNATIONAL BANK	165.
TOTAL FOREIGN INTEREST INCOME	364.