

**CANDIDATE OATH -  
JUDICIAL OFFICE**

Check box **only** if you are seeking to qualify as a write-in candidate:

Write-in candidate

**RECEIVED**

APR 14 2020

DUVAL COUNTY ELEC.  
By Vn

OFFICE USE ONLY

**Candidate Oath**

(Section 105.031, Florida Statutes)

I, SCOTT MITCHELL

(Print name above as you wish it to appear on the ballot. If your last name consists of two or more names but has no hyphen, check box . (See page 2 - Compound Last Names). No change can be made after the end of qualifying. Although a write-in candidate's name is not printed on the ballot, the name must be printed above for oath purposes.)

am a candidate for the judicial office of DUVAL COUNTY COURT JUDGE, 4<sup>TH</sup>,  
(Office) (District #) (Circuit #)

#1 ; my legal residence is DUVAL County, Florida; I am a qualified elector  
(Group #)

of the state and of the territorial jurisdiction of the court to which I seek election; I am qualified under the Constitution and the Laws of Florida to hold the judicial office to which I desire to be elected or in which I desire to be retained; I have qualified for no other public office in the state, the term of which office or any part thereof runs concurrent with the office I seek; and I have resigned from any office which I am required to resign pursuant to Section 99.012, Florida Statutes; and I will support the Constitution of the United States and the Constitution of the State of Florida.

Section 876.05, Florida Statutes, oath (only applicable if elected and when term of office begins): I, a citizen of the State of Florida and of the United States of America, and being employed by or an officer of the court system and a recipient of public funds as such employee or officer, do hereby solemnly swear or affirm that I will support the Constitution of the United States and of the State of Florida.

Candidate's Florida Voter Registration Number (located on your voter information card): 103900079

Phonetic spelling for audio ballot: Print name phonetically on the line below as you wish it to be pronounced on the audio ballot as may be used by persons with disabilities (see instructions on page 2 of this form): [Not applicable to write-in candidates.]

MI-CHULL

X Scott Mitchell



SMITCHELL@COJ.NET

Signature of Candidate

Telephone Number

Email Address

501 W. ADAMS STREET,

JACKSONVILLE

FLORIDA

32202

Address

City

State

ZIP Code

STATE OF FLORIDA

COUNTY OF DUVAL

Tracy Healy  
Signature of Notary Public

Print, Type, or Stamp Commissioned Name of Notary Public below:

Sworn to (or affirmed) and subscribed before me by physical  or online  presence this 7 day of April, 2020

Personally Known:  or Produced Identification:

Type of Identification Produced: \_\_\_\_\_



JUDGE SCOTT MITCHELL CAMPAIGN ACCOUNT

PAY TO THE ORDER OF

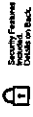
Dural County Supervisor of Elections

Six thousand seven hundred & 88/100

DATE 4.7.20

\$ 6073.88

DOLLARS



VALLEY.COM

Valley National Bank

Signature: Scott Kelly

FOR

MP

Please print or type your name, mailing address, agency name, and position below:

OF FINANCIAL INTERESTS

FOR OFFICE USE ONLY:

LAST NAME — FIRST NAME — MIDDLE NAME:

MITCHELL, SCOTT FARLEY

MAILING ADDRESS:

ROOM 2241 500 WEST ADAMS STREET

JACKSONVILLE 32202 Duval

CITY: ZIP: COUNTY:

1<sup>st</sup> JUDICIAL CIRCUIT

NAME OF AGENCY:

NAME OF OFFICE OR POSITION HELD OR SOUGHT:

County Judge

CHECK IF THIS IS A FILING BY A CANDIDATE

RECEIVED

APR 14 2020

DUVAL COUNTY ELEC.  
By VH

PART A -- NET WORTH

Please enter the value of your net worth as of December 31, 2019 or a more current date. [Note: Net worth is not calculated by subtracting your reported liabilities from your reported assets, so please see the instructions on page 3.]

My net worth as of December 31, 2019 was \$ 1,662,854<sup>00</sup>

PART B -- ASSETS

HOUSEHOLD GOODS AND PERSONAL EFFECTS:

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effects (described above) is \$ 124,500<sup>00</sup>

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)

VALUE OF ASSET

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
Residence - [REDACTED]	425,000 <sup>00</sup>
Prudential Brokerage Accts - Annuities 10B/195K	205,000 <sup>00</sup>
Charles Schwab Brokerage	1,058,154 <sup>00</sup>
TD Bank / Principal Stock / Cars 19K 82	31,100 / 500 / 18,000 / 25,200

PART C -- LIABILITIES

LIABILITIES IN EXCESS OF \$1,000 (See instructions on page 4):

NAME AND ADDRESS OF CREDITOR

AMOUNT OF LIABILITY

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
Close Mortgage, PO Box 9001871, Louisville KY 40298	202,500 <sup>00</sup>
NNFCU, P.O. Box 1369, Herndon, VA 20172 - Corolla	1,800
2019 Personal Income Tax Due	4200 <sup>00</sup>

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR

AMOUNT OF LIABILITY

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY

**PART D – INCOME**

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2019 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

I elect to file a copy of my 2019 federal income tax return and all W2's, schedules, and attachments.  
 [If you check this box and attach a copy of your 2019 tax return, you need not complete the remainder of Part D.]

**PRIMARY SOURCES OF INCOME (See instructions on page 5):**

NAME OF SOURCE OF INCOME EXCEEDING \$1,000	ADDRESS OF SOURCE OF INCOME	AMOUNT

**SECONDARY SOURCES OF INCOME [Major customers, clients, etc., of businesses owned by reporting person—see instructions on page 5]:**

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE

**PART E – INTERESTS IN SPECIFIED BUSINESSES [Instructions on page 6]**

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY			
ADDRESS OF BUSINESS ENTITY		na	
PRINCIPAL BUSINESS ACTIVITY			
POSITION HELD WITH ENTITY			
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

**PART F - TRAINING**

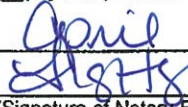
For officers required to complete annual ethics training pursuant to section 112.3142, F.S.

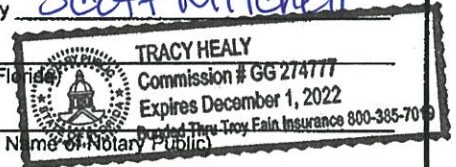
I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.

**OATH**

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed on this form and any attachments hereto is true, accurate, and complete.

STATE OF FLORIDA  
 COUNTY OF Duval  
 Sworn to (or affirmed) and subscribed before me by means of  
 physical presence or  online notarization, this 7<sup>th</sup> day of

April, 2020 by Scott Mitchell  
  
 (Signature of Notary Public—State of Florida)



(Print, Type, or Stamp Commissioned Name of Notary Public)

Personally Known  OR Produced Identification

Type of Identification Produced \_\_\_\_\_

Scott Mitchell  
 SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, \_\_\_\_\_, prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Preparation of this form by a CPA or attorney does not relieve the filer of the responsibility to sign the form under oath.**

**IF ANY OF PARTS A THROUGH E ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE**

**IRS e-file Signature Authorization**

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

Submission Identification Number (SID) ▶

Taxpayer's name <b>SCOTT F. MITCHELL</b>	Social security number *** ** [REDACTED]
Spouse's name <b>AMY A. MITCHELL</b>	Spouse's social security number *** ** [REDACTED]

Part I Tax Return Information - Tax Year Ending December 31, 2019 (Whole dollars only)	
1 Adjusted gross income (Form 1040 or 1040-SR, line 8b; Form 1040-NR, line 35)	1 232,960.
2 Total tax (Form 1040 or 1040-SR, line 16; Form 1040-NR, line 61)	2 37,784.
3 Federal income tax withheld from Forms W-2 and 1099 (Form 1040 or 1040-SR, line 17; Form 1040-NR, line 62a)	3 33,599.
4 Refund (Form 1040 or 1040-SR, line 21a; Form 1040-NR, line 73a; Form 1040-SS, Part I, line 13a)	4
5 Amount you owe (Form 1040 or 1040-SR, line 23; Form 1040-NR, line 75)	5 4,199.

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

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2019, and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

- I authorize SMOAK, DAVIS & NIXON LLP to enter or generate my PIN [REDACTED] as my signature on my tax year 2019 electronically filed income tax return. Enter five digits, but don't enter all zeros
- I will enter my PIN as my signature on my tax year 2019 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ *Scott Mitchell* Date ▶ \_\_\_\_\_

Spouse's PIN: check one box only

- I authorize SMOAK, DAVIS & NIXON LLP to enter or generate my PIN [REDACTED] as my signature on my tax year 2019 electronically filed income tax return. Enter five digits, but don't enter all zeros
- I will enter my PIN as my signature on my tax year 2019 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ *Amy A. Mitchell* Date ▶ 1/6/20

**Practitioner PIN Method Returns Only - continue below**

**Part III Certification and Authentication - Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. [REDACTED] Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2019 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ▶ ROBERT D. ROSARIO Date ▶ 03/15/2020

918995 01-13-20 **ERO Must Retain This Form - See Instructions**  
**Don't Submit This Form to the IRS Unless Requested To Do So**

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**Tax Year 2019 e-file Jurat/Disclosure  
for Form 1040 or 1040NR  
using Practitioner PIN method  
(with or without Electronic Funds Withdrawal)**

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**ERO Declaration**

I declare that the information contained in this electronic tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the taxpayer. If the furnished return was signed by a paid preparer, I declare I have entered the paid preparer's identifying information in the appropriate portion of this electronic return. If I am the paid preparer, under the penalties of perjury I declare that I have examined this electronic return, and to the best of my knowledge and belief, it is true, correct, and complete. This declaration is based on all information of which I have any knowledge.

**ERO Signature**

I am signing this Tax Return by entering my PIN below.

ERO's PIN

██████████  
(enter EFIN plus 5 self-selected numerics)

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**Taxpayer Declarations**

**Perjury Statement**

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 accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

**Consent to Disclosure**

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return/form to IRS and to receive the following information from IRS: a) an acknowledgment of receipt or reason for rejection of transmission; b) the reason for any delay in processing or refund; and, c) the date of any refund.

I am signing this Tax Return and Electronic Funds Withdrawal Consent, if applicable, by entering my Self-Select PIN below.

Taxpayer's PIN: ██████████

Date 03152020

Spouse's PIN: ██████████

2019

Form 1040-V

Department of the Treasury  
Internal Revenue Service

**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.

CLIENT COPY

910681 06-10-19

LHA

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

▼ DETACH HERE ▼

Form 1040-V (2019)

Department of the Treasury  
Internal Revenue Service

OMB No. 1545-0074  
**2019**

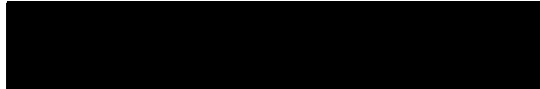
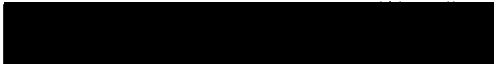
**Form 1040-V Payment Voucher**

- ▶ 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.

Enter the amount of your payment ▶	Dollars	Cents
	4,199	

1019

SCOTT F. & AMY A. MITCHELL



\*\*\*\*\* \*\* \*\*\*\* \* \*\*\*\*\* \*\*

Filing Status: Single, Married filing jointly (checked), 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 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.

Personal information section including names (SCOTT F., AMY A.), social security numbers, home address, and foreign information.

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, 1955, Are blind, Spouse: Was born before January 2, 1955, Is blind.

Table for dependents with columns for first name, last name, social security number, relationship to you, child tax credit, and credit for other dependents.

Main income and deduction table with rows for wages, interest, dividends, IRA distributions, pensions, social security benefits, capital gain, other income, adjustments, and taxable income.

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

Form 1040 (2019)



12a	Tax (see inst.) Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	12a	37,668.	12b	37,668.
b	Add Schedule 2, line 3, and line 12a and enter the total				
13a	Child tax credit or credit for other dependents	13a		13b	5.
b	Add Schedule 3, line 7, and line 13a and enter the total			14	37,663.
14	Subtract line 13b from line 12b. If zero or less, enter -0-			15	121.
15	Other taxes, including self-employment tax, from Schedule 2, line 10			16	37,784.
16	Add lines 14 and 15. This is your total tax			17	33,599.
17	Federal income tax withheld from Forms W-2 and 1099				

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

18	Other payments and refundable credits:				
a	Earned income credit (EIC)	18a			
b	Additional child tax credit. Attach Schedule 8812	18b			
c	American opportunity credit from Form 8863, line 8	18c			
d	Schedule 3, line 14	18d			
e	Add lines 18a through 18d. These are your total other payments and refundable credits	18e			
19	Add lines 17 and 18e. These are your total payments	19			33,599.

Refund	20	If line 19 is more than line 16, subtract line 16 from line 19. This is the amount you overpaid	20		
	21a	Amount of line 20 you want refunded to you. If Form 8888 is attached, check here	21a		
Direct deposit? See instructions.	b	Routing number	c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
	d	Account number			
	22	Amount of line 20 you want applied to your 2020 estimated tax	22		

Amount You Owe	23	Amount you owe. Subtract line 19 from line 16. For details on how to pay, see instructions	23		4,199.
	24	Estimated tax penalty (see instructions)	24		14.

**Third Party Designee** (Other than paid preparer) Do you want to allow another person (other than your paid preparer) 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: **JUDGE**

Spouse's signature, if a joint return, both must sign: \_\_\_\_\_ Date: \_\_\_\_\_ Spouse's occupation: **OFFICE ADMINISTRATOR**

Phone no.: \_\_\_\_\_ Email address: **AMYMITCHELL57@COMCAST.NET**

**Paid Preparer Use Only**

Preparer's name: **ROBERT D. ROSARIO** Preparer's signature: \_\_\_\_\_ Date: **03/15/20** PTIN: \_\_\_\_\_

Check if:  3rd Party Designee  Self-employed

Firm's name: **SMOAK, DAVIS & NIXON LLP** Phone no.: **904-396-5831** Firm's EIN: \*\*\*-\*\*-\*\*\*\*

Firm's address: **5011 GATE PARKWAY BLDG 100 STE 300 JACKSONVILLE, FL 32256-0562**

**SCHEDULE 1**  
(Form 1040 or 1040-SR)

**Additional Income and Adjustments to Income**

OMB No. 1545-0074

**2019**  
Attachment  
Sequence No. 01

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040 or 1040-SR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

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

**SCOTT F. & AMY A. MITCHELL**

Your social security number

\*\*\*-\*\*-\*\*\*\*

At any time during 2019, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?  Yes  No

**Part I Additional Income**

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions) ▶		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Attach Form 4797	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation	7	
8	Other income. List type and amount <b>FIDUCIARY FEES</b>	8	4,500.
9	Combine lines 1 through 8. Enter here and on Form 1040 or 1040-SR, line 7a	9	4,500.

**Part II Adjustments to Income**

10	Educator expenses	10	
11	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	11	
12	Health savings account deduction. Attach Form 8889	12	
13	Moving expenses for members of the Armed Forces. Attach Form 3903	13	
14	Deductible part of self-employment tax. Attach Schedule SE	14	61.
15	Self-employed SEP, SIMPLE, and qualified plans	15	
16	Self-employed health insurance deduction	16	
17	Penalty on early withdrawal of savings	17	
18a	Alimony paid	18a	
b	Recipient's SSN		
c	Date of original divorce or separation agreement (see instructions) ▶		
19	IRA deduction	19	
20	Student loan interest deduction	20	
21	Tuition and fees. Attach Form 8917	21	
22	Add lines 10 through 21. These are your adjustments to income. Enter here and on Form 1040 or 1040-SR, line 8a	22	61.

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

Schedule 1 (Form 1040 or 1040-SR) 2019

**SCHEDULE 2**  
(Form 1040 or 1040-SR)

**Additional Taxes**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040 or 1040-SR.

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

**2019**  
Attachment  
Sequence No. **02**

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

**SCOTT F. & AMY A. MITCHELL**

Your social security number

\*\*\*-\*\*-

**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 include on Form 1040 or 1040-SR, line 12b .....	3	0.

**Part II Other Taxes**

4	Self-employment tax. Attach Schedule SE .....	4	121.
5	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919 .....	5	
6	Additional tax on IRAs, other qualified retirement plans, and other tax-favored accounts. Attach Form 5329 if required .....	6	
7a	Household employment taxes. Attach Schedule H .....	7a	
b	Repayment of first-time homebuyer credit from Form 5405. Attach Form 5405 if required .....	7b	
8	Taxes from: a <input type="checkbox"/> Form 8959 b <input type="checkbox"/> Form 8960 c <input type="checkbox"/> Instructions; enter code(s) .....	8	
9	Section 965 net tax liability installment from Form 965-A .....	9	
10	Add lines 4 through 8. These are your total other taxes. Enter here and on Form 1040 or 1040-SR, line 15 .....	10	121.

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

Schedule 2 (Form 1040 or 1040-SR) 2019

CLIENT COPY

**SCHEDULE 3**  
(Form 1040 or 1040-SR)

**Additional Credits and Payments**

OMB No. 1545-0074

**2019**  
Attachment  
Sequence No. **03**

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040 or 1040-SR.

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

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

Your social security number

**SCOTT F. & AMY A. MITCHELL**

\*\*\*-\*\*-\*\*\*\*

**Part I Nonrefundable Credits**

1	Foreign tax credit. Attach Form 1116 if required .....	1	5.
2	Credit for child and dependent care expenses. 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	
6	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/> .....	6	
7	Add lines 1 through 6. Enter here and include on Form 1040 or 1040-SR, line 13b .....	7	5.

**Part II Other Payments and Refundable Credits**

8	2019 estimated tax payments and amount applied from 2018 return .....	8	
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	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/> .....	13	
14	Add lines 8 through 13. Enter here and on Form 1040 or 1040-SR, line 18d .....	14	

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

Schedule 3 (Form 1040 or 1040-SR) 2019

CLIENT COPY

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

Department of the Treasury  
Internal Revenue Service

▶ 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, 1040-NR-EZ, or 1041.

**2019**  
Attachment  
Sequence No. **06**

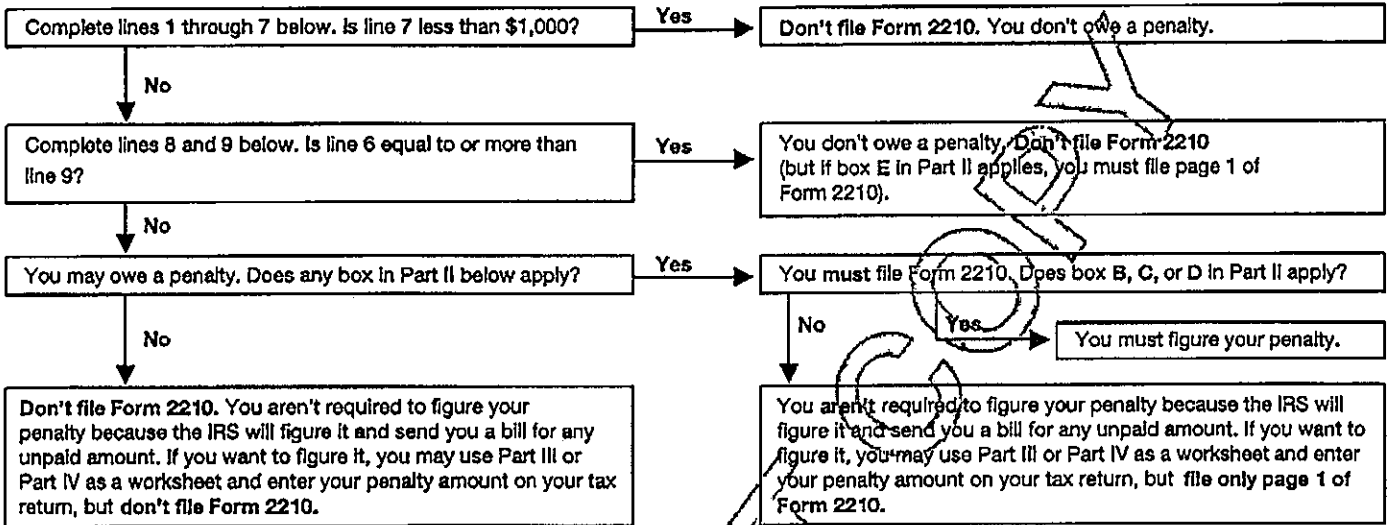
Name(s) shown on tax return

Identifying number

**SCOTT F. & AMY A. MITCHELL**

\*\*\*-\*\*-\*\*\*\*

**Do You Have To File Form 2210?**



**Part I Required Annual Payment**

1	Enter your 2019 tax after credits from Form 1040 or Form 1040-SR, line 14 (see instructions if not filing Form 1040 or Form 1040-SR)	1	37,663.
2	Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	121.
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, stop; you don't owe a penalty. Don't file Form 2210	4	37,784.
5	Multiply line 4 by 90% (0.90)	5	34,006.
6	Withholding taxes. Don't include estimated tax payments (see instructions)	6	33,599.
7	Subtract line 6 from line 4. If less than \$1,000, stop; you don't owe a penalty. Don't file Form 2210	7	4,185.
8	Maximum required annual payment based on prior year's tax (see instructions)	8	48,887.
9	Required annual payment. Enter the smaller of line 5 or line 8	9	34,006.

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 2018 or 2019, 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).

**Part III Short Method**

**Can You Use the Short Method?**

You can use the short method if:

- You made no estimated tax payments (or your only payments were withheld federal income tax), or
- You paid the same amount of estimated tax on each of the four payment due dates.

**Must You Use the Regular Method?**

You must use the regular method (Part IV) instead of the short method if:

- You made any estimated tax payments late,
- You checked box C or D in Part II, or
- You are filing Form 1040-NR or 1040-NR-EZ and you didn't receive wages as an employee subject to U.S. income tax withholding.

**Note:** If any payment was made earlier than the due date, you can use the short method, but using it may cause you to pay a larger penalty than the regular method. If the payment was only a few days early, the difference is likely to be small.

10	Enter the amount from Form 2210, line 9 .....	10	34,006.
11	Enter the amount, if any, from Form 2210, line 6 .....	11	33,599.
12	Enter the total amount, if any, of estimated tax payments you made .....	12	
13	Add lines 11 and 12 .....	13	33,599.
14	Total underpayment for year. Subtract line 13 from line 10. If zero or less, stop; you don't owe a penalty. Don't file Form 2210 unless you checked box E in Part II .....	14	407.
15	Multiply line 14 by 0.03398 .....	15	14.
16	• If the amount on line 14 was paid on or after 4/15/20, enter -0-. • If the amount on line 14 was paid before 4/15/20, make the following computation to find the amount to enter on line 16. Amount on line 14 x Number of days paid before 4/15/20 x 0.00014 .....	16	0.
17	Penalty. Subtract line 16 from line 15. Enter the result here and on Form 1040 or Form 1040-SR, line 24; Form 1040-NR, line 76; Form 1040-NR-EZ, line 26; or Form 1041, line 27. Don't file Form 2210 unless you checked a box in Part II .....	17	14.

Form 2210 (2019)

**Interest and Ordinary Dividends**

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

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

▶ Attach to Form 1040 or 1040-SR.

Your social security number

\*\*\* \*\*

**SCOTT F. & AMY A. MITCHELL**

**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 ▶  
**CHARLES SCHWAB**

Amount

1,077.

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 ..... 2 **1,077.**  
3 Excludable interest on series EE and 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 **1,077.**

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

**Part II**

**Ordinary Dividends**

5 List name of payer ▶  
**PRINCIPAL FINANCIAL GROUP INC. C/O COMPUTERSHARE**  
**NATIONAL FINANCIAL SERVICES LLC**  
**CHARLES SCHWAB**

Amount

218.

7,775.

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.

6 Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b ..... ▶ 6 **7,993.**

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
7a At any time during 2019, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions. If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		X
b If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located		
8 During 2019, 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

**Foreign Accounts and Trusts**

Caution: If required, failure to file FinCEN Form 114 may result in substantial penalties. See instructions, 927501 11-19-19

## Interest and Dividend Summary

Name: SCOTT F. & AMY A. MITCHELL

FEIN/SSN: \*\*\*-\*\*-\*\*\*\*

Payer	Interest	Interest on U.S. Savings Bonds	Tax-Exempt Interest	Private Activity Interest	Market Discount	Original Issue Discount (OID)	Ordinary Dividends	Qualified Dividends
A PRINCIPAL FINANCIAL GROUP INC. C/O COMPUTERSHARE							218.	218.
B NATIONAL FINANCIAL SERVICES LLC								
C CHARLES SCHWAB	905.	172.						
D CHARLES SCHWAB							7,775.	7,775.
E								
F								
G								
H								
I								
J								
K								
<b>Totals</b>	<b>905.</b>	<b>172.</b>					<b>7,993.</b>	<b>7,993.</b>

Capital Gain Distributions	Unrecaptured Section 1250 Gain	Section 1202 Gain	Collectibles	Section 199A Dividends	Investment Expenses	Federal Tax Withheld	State Tax Withheld	Foreign Tax Paid
A								
B								
C								
D	30.	8.		289.				5.
E								
F								
G								
H								
I								
J								
K								
<b>Totals</b>	<b>30.</b>	<b>8.</b>		<b>289.</b>				<b>5.</b>



**Capital Gains and Losses**

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

Name(s) shown on return

Your social security number

**SCOTT F. & AMY A. MITCHELL**

\*\*\*-\*\*-XXXX

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				
1b	Totals for all transactions reported on Form(s) 8949 with Box A checked				
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 page 2				7

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.		(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a	Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8b	Totals for all transactions reported on Form(s) 8949 with Box D checked				
9	Totals for all transactions reported on Form(s) 8949 with Box E checked				
10	Totals for all transactions reported on Form(s) 8949 with Box F checked				
11	Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12	Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13	Capital gain distributions <b>SEE STATEMENT 3</b>				13 30.
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 page 2				15 30.

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

Schedule D (Form 1040) 2019

**Part III Summary**

<p><b>16</b> Combine lines 7 and 15 and enter the result .....</p> <ul style="list-style-type: none"> <li>• If line 16 is a <b>gain</b>, enter the amount from line 16 on Form 1040 or 1040-SR, line 6; or Form 1040-NR, line 14. Then go to line 17 below.</li> <li>• If line 16 is a <b>loss</b>, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.</li> <li>• If line 16 is <b>zero</b>, skip lines 17 through 21 below and enter -0- on Form 1040 or 1040-SR, line 6; or Form 1040-NR, line 14. Then go to line 22.</li> </ul> <p><b>17</b> Are lines 15 and 16 both gains?  <input checked="" type="checkbox"/> <b>Yes.</b> Go to line 18.  <input type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.</p> <p><b>18</b> If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet .....</p> <p><b>19</b> If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet <b>SEE STATEMENT 4</b> .....</p> <p><b>20</b> Are lines 18 and 19 both zero or blank?  <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 12a (or in the instructions for Form 1040-NR, line 42). Don't complete lines 21 and 22 below.  <input checked="" type="checkbox"/> <b>No.</b> Complete the <b>Schedule D Tax Worksheet</b> in the instructions. Don't complete lines 21 and 22 below.</p> <p><b>21</b> If line 16 is a loss, enter here and on Form 1040 or 1040-SR, line 6; or Form 1040-NR, line 14, the smaller of:  <ul style="list-style-type: none"> <li>• The loss on line 16; or</li> <li>• (\$3,000), or if married filing separately, (\$1,500)</li> </ul> <p><b>Note:</b> When figuring which amount is smaller, treat both amounts as positive numbers.</p> <p><b>22</b> Do you have qualified dividends on Form 1040 or 1040-SR, line 3a; or Form 1040-NR, line 10b?  <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 12a (or in the instructions for Form 1040-NR, line 42).  <input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.</p> </p>	<p><b>16</b></p> <p><b>18</b></p> <p><b>19</b></p> <p><b>21</b></p>	<p><b>30.</b></p> <p><b>8.</b></p>
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**Schedule D Tax Worksheet**

Name(s) shown on return **SCOTT F. & AMY A. MITCHELL** Your SSN **\*\*\*-\*\*-XXXX**

Complete this worksheet only if line 18 or line 19 of Schedule D is more than zero and lines 15 and 16 of Schedule D are gains. Otherwise, complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 12a (or in the instructions for Form 1040-NR, line 42) to figure your tax. Before completing this worksheet, complete Form 1040 or 1040-SR through line 11b (or Form 1040-NR through line 41).  
 Exception: Don't use the Qualified Dividends and Capital Gain Tax Worksheet or this worksheet to figure your tax if:  
 • Line 15 or line 16 of Schedule D is zero or less and you have no qualified dividends on Form 1040 or 1040-SR, line 3a (or Form 1040-NR, line 10b); or  
 • Form 1040 or 1040-SR, line 11b (or Form 1040-NR, line 41) is zero or less.  
 Instead, see the instructions for Forms 1040 and 1040-SR, line 12a (or Form 1040-NR, line 42).

1. Enter your taxable income from Form 1040 or 1040-SR, line 11b (or Form 1040-NR, line 41). (However, if you are filing Form 2555 (relating to foreign earned income), enter instead the amount from line 3 of the Foreign Earned Income Tax Worksheet in the instructions for Forms 1040 and 1040-SR, line 12a) ..... 1. 208,502.

2. Enter your qualified dividends from Form 1040 or 1040-SR, line 3a (or Form 1040-NR, line 10b) ..... 2. 7,993.

3. Enter the amount from Form 4952 (used to figure investment interest expense deduction), line 4g ..... 3. \_\_\_\_\_

4. Enter the amount from Form 4952, line 4e\* ..... 4. \_\_\_\_\_

5. Subtract line 4 from line 3. If zero or less, enter -0- ..... 5. \_\_\_\_\_

6. Subtract line 5 from line 2. If zero or less, enter -0- ..... 6. 7,993.

7. Enter the smaller of line 15 or line 16 of Sch. D ... 7. 30.

8. Enter the smaller of line 3 or line 4 ..... 8. \_\_\_\_\_

9. Subtract line 8 from line 7. If zero or less, enter -0- ..... 9. 30.

10. Add lines 6 and 9 ..... 10. 8,023.

11. Add lines 18 and 19 of Schedule D\*\* ..... 11. 8.

12. Enter the smaller of line 9 or line 11 ..... 12. 8.

13. Subtract line 12 from line 10 ..... 13. 8,015.

14. Subtract line 13 from line 1. If zero or less, enter -0- ..... 14. 200,487.

15. Enter:  
 • \$39,375 if single or married filing separately;  
 • \$78,750 if married filing jointly or qualifying widow(er); or  
 • \$52,750 if head of household. } ..... 15. 78,750.

16. Enter the smaller of line 1 or line 15 ..... 16. 78,750.

17. Enter the smaller of line 14 or line 16 ..... 17. 78,750.

18. Subtract line 10 from line 1. If zero or less, enter -0- ..... 18. 200,487.

19. Enter the smaller of line 1 or:  
 • \$160,725 if single or married filing separately;  
 • \$321,450 if married filing jointly or qualifying widow(er); or  
 • \$160,700 if head of household } ..... 19. 208,502.

20. Enter the smaller of line 14 or line 19 ..... 20. 200,487.

21. Enter the larger of line 18 or line 20 ..... 21. 200,487.

22. Subtract line 17 from line 16. This amount is taxed at 0% ..... 22. 0.

If lines 1 and 16 are the same, skip lines 23 through 43 and go to line 44. Otherwise, go to line 23.

23. Enter the smaller of line 1 or line 13 ..... 23. 8,015.

24. Enter the amount from line 22. (If line 22 is blank, enter -0-.) ..... 24. 0.

25. Subtract line 24 from line 23. If zero or less, enter -0- ..... 25. 8,015.

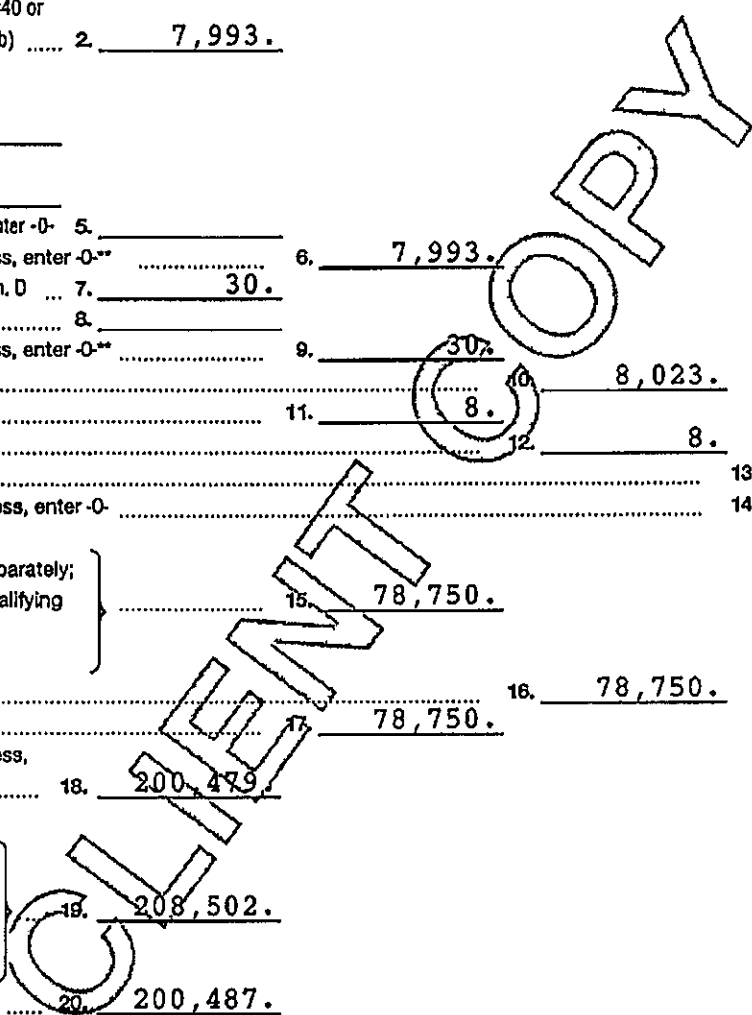
26. Enter:  
 • \$434,550 if single;  
 • \$244,425 if married filing separately;  
 • \$488,850 if married filing jointly or qualifying widow(er); or  
 • \$461,700 if head of household. } ..... 26. 488,850.

27. Enter the smaller of line 1 or line 26 ..... 27. 208,502.

28. Add lines 21 and 22 ..... 28. 200,487.

29. Subtract line 28 from line 27. If zero or less, enter -0- ..... 29. 8,015.

30. Enter the smaller of line 25 or line 29 ..... 30. 8,015.



Schedule D Tax Worksheet - *Continued*

31. Multiply line 30 by 15% (0.15)	31.	<u>1,202.</u>
32. Add lines 24 and 30	32.	<u>8,015.</u>
If lines 1 and 32 are the same, skip lines 33 through 43 and go to line 44. Otherwise, go to line 33.		
33. Subtract line 32 from line 23	33.	<u>0.</u>
34. Multiply line 33 by 20% (0.20)	34.	<u>0.</u>
If Schedule D, line 19, is zero or blank, skip lines 35 through 40 and go to line 41. Otherwise, go to line 35.		
35. Enter the smaller of line 9 above or Schedule D, line 19	35.	<u>8.</u>
36. Add lines 10 and 21	36.	<u>208,510.</u>
37. Enter the amount from line 1 above	37.	<u>208,502.</u>
38. Subtract line 37 from line 36. If zero or less, enter -0-	38.	<u>8.</u>
39. Subtract line 38 from line 35. If zero or less, enter -0-	39.	<u>0.</u>
40. Multiply line 39 by 25% (0.25)	40.	<u>0.</u>
If Schedule D, line 18, is zero or blank, skip lines 41 through 43 and go to line 44. Otherwise, go to line 41.		
41. Add lines 21, 22, 30, 33, and 39	41.	<u>0.</u>
42. Subtract line 41 from line 1	42.	<u>0.</u>
43. Multiply line 42 by 28% (0.28)	43.	<u>0.</u>
44. Figure the tax on the amount on line 21. If the amount on line 21 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 21 is \$100,000 or more, use the Tax Computation Worksheet	44.	<u>36,466.</u>
45. Add lines 31, 34, 40, 43, and 44	45.	<u>37,668.</u>
46. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	46.	<u>38,389.</u>
47. Tax on all taxable income (including capital gains and qualified dividends). Enter the smaller of line 45 or line 46. Also include this amount on Form 1040 or 1040-SR, line 12a (or Form 1040-NR, line 42) (If you are filing Form 2555, don't enter this amount on Form 1040 or 1040-SR, line 12a. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet in the Instructions for Forms 1040 and 1040-SR)	47.	<u>37,668.</u>

\* If applicable, enter instead the smaller amount you entered on the dotted line next to line 4e of Form 4952.  
 \*\* If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet in the Instructions for Forms 1040 and 1040-SR, line 12a, before completing this line.

CLIENT

Name of person with self-employment income (as shown on Form 1040, 1040-SR, or 1040-NR)

Social security number of person with self-employment income

\*\*\* \*\*

SCOTT F. MITCHELL

Section B - Long Schedule SE

Part I Self-Employment Tax

Note: If your only income subject to self-employment tax is church employee income, see instructions. Also see instructions for the definition of church employee income.

Table with 13 rows for self-employment tax calculation. Includes lines 1a through 13. Values include 4,500, 4,156, 132,900, and 121. Includes handwritten 'COPIED' watermark.

Part II Optional Methods To Figure Net Earnings (see instructions)

Table with 3 rows for optional methods. Includes Farm Optional Method (lines 14-15) and Nonfarm Optional Method (lines 16-17). Values include 5,440.

1 From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.

3 From Sch. C, line 31; and Sch. K-1 (Form 1065), box 14, code A.

2 From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A - minus the amount you would have entered on line 1b had you not used the optional method.

4 From Sch. C, line 7; and Sch. K-1 (Form 1065), box 14, code C.

**Foreign Tax Credit**

(Individual, Estate, or Trust)

**2019**

Attachment Sequence No. **19**

Department of the Treasury  
Internal Revenue Service (99)

▶ 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 **SCOTT F. & AMY A. MITCHELL** Identifying number as shown on page 1 of your tax return \*\*\*-\*\*-\*\*\*\*

**SCOTT F. & AMY A. MITCHELL**

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	
<b>i Enter the name of the foreign country or U.S. possession</b> <b>OTHER COUNTRIES</b>				
<b>1a</b> Gross income from sources within country shown above and of the type checked above:	33.			<b>1a</b> 33.
<b>b</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>				
<b>2</b> Expenses definitely related to the income on line 1a (attach statement)				
<b>3</b> Pro rata share of other deductions not definitely related:				
<b>a</b> Certain itemized deductions or standard deduction	24,400.			
<b>b</b> Other deductions (attach statement)	24,400.			
<b>c</b> Add lines 3a and 3b	33.			
<b>d</b> Gross foreign source income	233,021.			
<b>e</b> Gross income from all sources	.000141618			
<b>f</b> Divide line 3d by line 3e	3.			
<b>g</b> Multiply line 3c by line 3f				
<b>4</b> Pro rata share of interest expense:				
<b>a</b> Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
<b>b</b> Other interest expense				
<b>5</b> Losses from foreign sources				
<b>6</b> Add lines 2, 3g, 4a, 4b, and 5	3.			<b>6</b> 3.
<b>7</b> Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				<b>7</b> 30.

**Part II Foreign Taxes Paid or Accrued**

Country	Foreign taxes paid or accrued										
	In foreign currency					In U.S. dollars					
	Taxes withheld at source on:					Taxes withheld at source on:					
(j) <input checked="" type="checkbox"/> Paid											(u) Total foreign taxes paid or accrued (add cols. (q) through (t))
(k) <input type="checkbox"/> Accrued											
(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends	(r) Rents and royalties	(s) Interest	(t) Other foreign taxes paid or accrued			
A					5.				5.		
B											
C											
<b>8</b> Add lines A through C, column (u). Enter the total here and on line 9, page 2										<b>8</b> 5.	

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2019)

**Part III Figuring the Credit**

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	5.
10	Carryback or carryover (attach detailed computation) (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	
11	Add lines 9 and 10	5.
12	Reduction in foreign taxes	
13	Taxes reclassified under high tax kickout	
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	5.
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	30.
16	Adjustments to line 15	
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 22. However, if you are filing more than one Form 1116, you must complete line 20.)	30.
18	Individuals: Enter the amount from Form 1040 or 1040-SR, line 11b; or Form 1040-NR, line 41. Estates and trusts: Enter your taxable income without the deduction for your exemption <i>Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.</i>	208,502.
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	.00014
20	Individuals: Enter the total of Form 1040 or 1040-SR, line 12a, and Schedule 2 (Form 1040 or 1040-SR), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, lines 42 and 44. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, lines 41, 42, and 44. Foreign estates and trusts should enter the amount from Form 1040-NR, line 42 <i>Caution: If you are completing line 20 for separate category g (lump-sum distributions), see instructions.</i>	37,668.
21	Multiply line 20 by line 19 (maximum amount of credit)	5.
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 30 and enter this amount on line 31. Otherwise, complete the appropriate line in Part IV	5.

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

23	Credit for taxes on section 951A category income	
24	Credit for taxes on foreign branch category income	
25	Credit for taxes on passive category income	
26	Credit for taxes on general category income	
27	Credit for taxes on section 901(j) income	
28	Credit for taxes on certain income re-sourced by treaty	
29	Credit for taxes on lump-sum distributions	
30	Add lines 23 through 29	
31	Enter the smaller of line 20 or line 30	5.
32	Reduction of credit for international boycott operations	
33	Subtract line 32 from line 31. This is your foreign tax credit. Enter here and on Schedule 3 (Form 1040 or 1040-SR), line 1; Form 1040-NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 46a	5.

**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.

**2019**

Attachment  
Sequence No. **19**

Name

Identifying number as shown on page 1 of your tax return

**SCOTT F. & AMY A. MITCHELL**

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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	
<b>i</b> Enter the name of the foreign country or U.S. possession	<b>OTHER COUNTRIES</b>			
<b>1a</b> Gross income from sources within country shown above and of the type checked above:				
	33.			1a 33.
<b>b</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>				
<b>2</b> Expenses definitely related to the income on line 1a (attach statement)				
<b>3</b> Pro rata share of other deductions not definitely related:				
<b>a</b> Certain itemized deductions or standard deduction				
<b>b</b> Other deductions (attach statement)				
<b>c</b> Add lines 3a and 3b				
<b>d</b> Gross foreign source income		33.		
<b>e</b> Gross income from all sources		233,021.		
<b>f</b> Divide line 3d by line 3e		.000141618		
<b>g</b> Multiply line 3c by line 3f				
<b>4</b> Pro rata share of interest expense:				
<b>a</b> Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
<b>b</b> Other interest expense				
<b>5</b> Losses from foreign sources				
<b>6</b> Add lines 2, 3g, 4a, 4b, and 5				6
<b>7</b> Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 33.

**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						5.				5.
B										
C										
<b>8</b> Add lines A through C, column (u). Enter the total here and on line 9, page 2										8 5.

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2019)



ALTERNATIVE MINIMUM TAX

**Part III Figuring the Credit**

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	9	5.	
10	Carryback or carryover (attach detailed computation) (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	5.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		5.
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	15	33.	
16	Adjustments to line 15	16		
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 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	33.	
18	Individuals: Enter the amount from Form 1040 or 1040-SR, line 11b; or Form 1040-NR, line 41. Estates and trusts: Enter your taxable income without the deduction for your exemption <b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	232,902.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		.00014
20	Individuals: Enter the total of Form 1040 or 1040-SR, line 12a, and Schedule 2 (Form 1040 or 1040-SR), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, lines 42 and 44. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, lines 41, 42, and 44. Foreign estates and trusts should enter the amount from Form 1040-NR, line 42 <b>Caution:</b> If you are completing line 20 for separate category g (lump-sum distributions), see instructions.	20		30,631.
21	Multiply line 20 by line 19 (maximum amount of credit)	21		4.
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 30 and enter this amount on line 31. Otherwise, complete the appropriate line in Part IV	22		4.

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

23	Credit for taxes on section 951A category income	23		
24	Credit for taxes on foreign branch category income	24		
25	Credit for taxes on passive category income	25		
26	Credit for taxes on general category income	26		
27	Credit for taxes on section 901(j) income	27		
28	Credit for taxes on certain income re-sourced by treaty	28		
29	Credit for taxes on lump-sum distributions	29		
30	Add lines 23 through 29	30		
31	Enter the smaller of line 20 or line 30	31		4.
32	Reduction of credit for international boycott operations	32		
33	Subtract line 32 from line 31. This is your foreign tax credit. Enter here and on Schedule 3 (Form 1040 or 1040-SR), line 1; Form 1040-NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 46a	33		4.

**Qualified Business Income Deduction  
Simplified Computation**

Department of the Treasury  
Internal Revenue Service

▶ Attach to your tax return.

▶ Go to [www.irs.gov/Form8995](http://www.irs.gov/Form8995) for instructions and the latest information.

Name(s) shown on return

Your taxpayer identification number

**SCOTT F. & AMY A. MITCHELL**

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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) <b>SEE STATEMENT 6</b>	6	289.
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	289.
9	REIT and PTP component. Multiply line 8 by 20% (0.20)		9 58.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9		10 58.
11	Taxable income before qualified business income deduction	11	208,560.
12	Net capital gain (see instructions)	12	8,023.
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	200,537.
14	Income limitation. Multiply line 13 by 20% (0.20)		14 40,107.
15	Qualified business income deduction. Enter the lesser of line 10 or line 14. Also enter this amount on the applicable line of your return ▶		15 58.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-		16 ( )
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-		17 ( )

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

NAME

SCOTT F. & AMY A. MITCHELL

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INCOME TYPE	TOTAL	U.S.	FOREIGN PASSIVE
Compensation	219,421.	219,421.	
Dividends/Distributions	SEE STATEMENT 7 7,993.	7,960.	33.
Interest	1,077.	1,077.	
Capital Gains	30.	30.	
Business/Profession			
Rent/Royalty			
State/Local Refunds			
Partnership/S Corporation			
Trust/Estate			
Other Income	4,500.	4,500.	
Gross Income	233,021.	232,988.	33.
Less:			
Section 911 Exclusion			
Capital Losses			
Capital Gains Tax Adjustment			
Total Income - Form 1116	233,021.	232,988.	33.
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	61.	61.	
Self-employment Health Insurance			
Keogh Contributions			
Allmony			
Forfeited Interest			
Foreign Housing Deduction			
Other Adjustments			
Capital Gains Tax Adjustment			
Total Deductions	61.	61.	
Adjusted Gross Income	232,960.	232,927.	33.
Less Itemized Deductions:			
Specifically Allocated			
Home Mortgage Interest			
Other Interest			
Ratably Allocated	24,400.	24,397.	3.
Total Adjustments to Adjusted Gross Income	24,400.	24,397.	3.
Taxable Income	208,560.	208,530.	30.

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NAME

SCOTT F. & AMY A. MITCHELL

\*\*\*-\*\*-\*\*\*\*

Foreign Income Category

PASSIVE INCOME

Regular

	2014	2015	2016	2017	2018	2019
1. Foreign tax paid/accrued						5.
2. FTC carryback to 2019 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						5.
5. Maximum credit allowable						5.
6. Unused foreign tax (+) or excess of limit (-)						
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining						
Total foreign taxes from all available years to be carried to next year						

	2009	2010	2011	2012	2013
1. Foreign tax paid/accrued					
2. FTC carryback to 2019 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

SCOTT F. & AMY A. MITCHELL

\*\*\*-\*\*-XXXX

Foreign Income Category

PASSIVE INCOME

AMT

	2014	2015	2016	2017	2018	2019
1. Foreign tax paid/accrued						5.
2. FTC carryback to 2019 for amended returns ...						
3. Reduction in foreign taxes .....						
4. Foreign tax available ...						5.
5. Maximum credit allowable .....						4.
6. Unused foreign tax ( + ) or excess of limit ( - ) ...						1.
7. Foreign tax carryback ...						
8. Foreign tax carryforward .....						
9. Foreign tax or excess limit remaining .....						1.
Total foreign taxes from all available years to be carried to next year .....						1.

	2009	2010	2011	2012	2013
1. Foreign tax paid/accrued .....					
2. FTC carryback to 2019 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
S CRONIN & MAXWELL, PL	77,626.	13,283.			5,036.	1,178.
T STATE OF FLORIDA CHIEF FINANCIAL OFFICER	141,795.	20,316.			8,240.	2,122.
<b>TOTALS</b>	<b>219,421.</b>	<b>33,599.</b>			<b>13,276.</b>	<b>3,300.</b>

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 2

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
PRINCIPAL FINANCIAL GROUP INC. C/O COMPUTERSHARE CHARLES SCHWAB	218. 7,775.	218. 7,775.
<b>TOTAL INCLUDED IN FORM 1040, LINE 3A</b>		<b>7,993.</b>

SCHEDULE D CAPITAL GAIN DISTRIBUTIONS STATEMENT 3

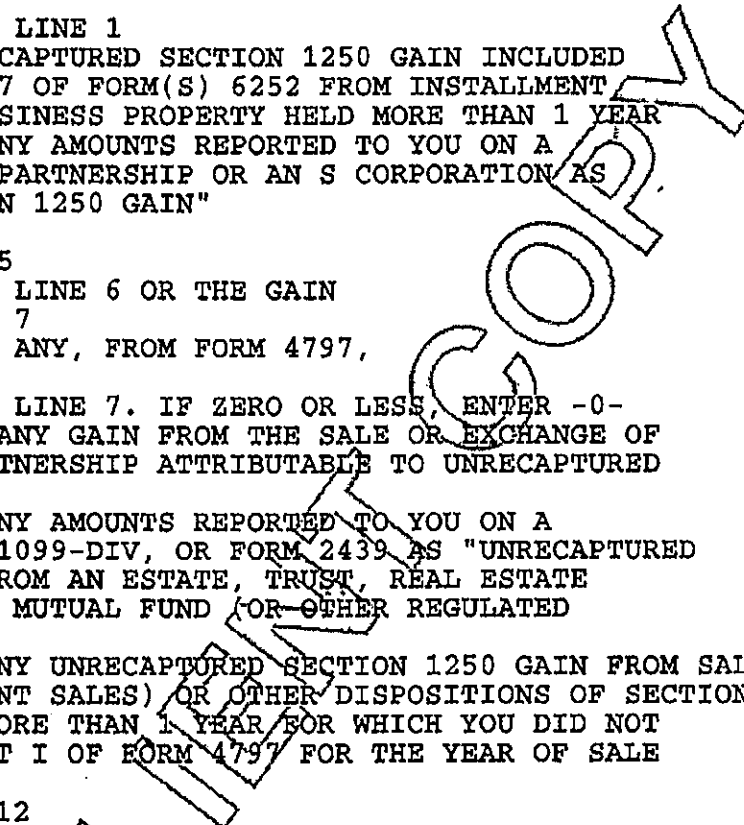
NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
CHARLES SCHWAB	30.	
<b>TOTALS TO SCHEDULE D, LINE 13</b>	<b>30.</b>	

SCHEDULE D

UNRECAPTURED SECTION 1250 GAIN

STATEMENT 4

1. IF YOU HAVE A SECTION 1250 PROPERTY IN PART III OF FORM 4797 FOR WHICH YOU MADE AN ENTRY IN PART I OF FORM 4797, ENTER THE SMALLER OF LINE 22 OR LINE 24 OF FORM 4797 FOR THAT PROPERTY. IF YOU DID NOT HAVE ANY SUCH PROPERTY, GO TO LINE 4
2. ENTER THE AMOUNT FROM FORM 4797, LINE 26G, FOR THE PROPERTY FOR WHICH YOU MADE AN ENTRY ON LINE 1
3. SUBTRACT LINE 2 FROM LINE 1
4. ENTER THE TOTAL UNRECAPTURED SECTION 1250 GAIN INCLUDED ON LINE 26 OR LINE 37 OF FORM(S) 6252 FROM INSTALLMENT SALES OF TRADE OR BUSINESS PROPERTY HELD MORE THAN 1 YEAR
5. ENTER THE TOTAL OF ANY AMOUNTS REPORTED TO YOU ON A SCHEDULE K-1 FROM A PARTNERSHIP OR AN S CORPORATION AS "UNRECAPTURED SECTION 1250 GAIN"
6. ADD LINES 3 THROUGH 5
7. ENTER THE SMALLER OF LINE 6 OR THE GAIN FROM FORM 4797, LINE 7
8. ENTER THE AMOUNT, IF ANY, FROM FORM 4797, LINE 8
9. SUBTRACT LINE 8 FROM LINE 7. IF ZERO OR LESS, ENTER -0-
10. ENTER THE AMOUNT OF ANY GAIN FROM THE SALE OR EXCHANGE OF AN INTEREST IN A PARTNERSHIP ATTRIBUTABLE TO UNRECAPTURED SECTION 1250 GAIN
11. ENTER THE TOTAL OF ANY AMOUNTS REPORTED TO YOU ON A SCHEDULE K-1, FORMS 1099-DIV, OR FORM 2439 AS "UNRECAPTURED SECTION 1250 GAIN" FROM AN ESTATE, TRUST, REAL ESTATE INVESTMENT TRUST, OR MUTUAL FUND (OR OTHER REGULATED INVESTMENT COMPANY) 8.
12. ENTER THE TOTAL OF ANY UNRECAPTURED SECTION 1250 GAIN FROM SALES (INCLUDING INSTALLMENT SALES) OR OTHER DISPOSITIONS OF SECTION 1250 PROPERTY HELD MORE THAN 1 YEAR FOR WHICH YOU DID NOT MAKE AN ENTRY IN PART I OF FORM 4797 FOR THE YEAR OF SALE 8.
13. ADD LINES 9 THROUGH 12 8.
14. IF YOU HAD ANY SECTION 1202 GAIN OR COLLECTIBLE GAIN OR (LOSS), ENTER THE TOTAL OF LINES 1 THROUGH 4 OF THE 28% RATE GAIN WORKSHEET
15. ENTER THE (LOSS), IF ANY, FROM SCH D, LINE 7. IF SCH D, LINE 7, IS ZERO OR A GAIN ENTER -0- 0.
16. ENTER YOUR LONG-TERM CAPITAL LOSS CARRYOVERS FROM SCHEDULE D, LINE 14, AND SCHEDULE K-1 (FORM 1041), BOX 11, CODE C
17. COMBINE LINES 14 THROUGH 16. IF THE RESULT IS A (LOSS), ENTER IT AS A POSITIVE AMOUNT. IF THE RESULT IS ZERO OR A GAIN, ENTER -0- 0.
18. SUBTRACT LINE 17 FROM LINE 13. IF ZERO OR LESS, ENTER -0-. IF MORE THAN ZERO, ENTER THE RESULT HERE AND ON SCHEDULE D, LINE 19 8.



SCHEDULE SE	NON-FARM INCOME	STATEMENT 5
DESCRIPTION		AMOUNT
FIDUCIARY FEES		4,500.
TOTAL TO SCHEDULE SE, LINE 2		4,500.

FORM 8995	QUALIFIED REIT DIVIDENDS AND PTP INCOME	STATEMENT 6
NAME OF ENTITY/ACTIVITY	REIT DIVIDENDS	PTP INCOME
CHARLES SCHWAB	289.	
TOTAL TO FORM 8995, LINE 6	289.	

FORM 1116	U.S. AND FOREIGN SOURCE INCOME SUMMARY FOREIGN DIVIDEND INCOME	STATEMENT 7
DESCRIPTION		AMOUNT
CHARLES SCHWAB		33.
TOTAL FOREIGN DIVIDEND INCOME		33.

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Tax Return Carryovers to 2020

NAME: SCOTT F. & AMY A. MITCHELL

ID Number: \*\*\*-\*\*-\*\*\*\*

Disallowing Form	Description	Originating Form	Entity/ Activity	SV/ City	Amount
1116AMT	PASSIVE INC C/O FROM 2019	1116 AMT			1.

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# Two-Year Comparison Worksheet

# 2019

Name(s) as shown on return: **SCOTT F. & AMY A. MITCHELL** Social security number: **\*\*\*-\*\*-\*\*\*\***

2018 Filing Status: **MARRIED FILING JOINT** 2019 Filing Status: **MARRIED FILING JOINT**

2018 Tax Bracket: **24.0%** 2019 Tax Bracket: **24.0%**

Description	Tax Year 2018	Tax Year 2019	Increase (Decrease)
WAGES, SALARIES, AND TIPS	264,729.	219,421.	-45,308.
SCHEDULE B - TAXABLE INTEREST	0.	1,077.	1,077.
SCHEDULE B - QUALIFIED DIVIDENDS	210.	7,993.	7,783.
SCHEDULE B - ORDINARY DIVIDENDS	518.	7,993.	7,475.
SCHEDULE D (CAPITAL GAIN/LOSS)	0.	30.	30.
OTHER INCOME	3,500.	4,500.	1,000.
<b>TOTAL INCOME</b>	<b>268,747.</b>	<b>233,021.</b>	<b>-35,726.</b>
DEDUCTIBLE PART OF SE TAX	47.	61.	14.
<b>TOTAL ADJUSTMENTS</b>	<b>47.</b>	<b>61.</b>	<b>14.</b>
<b>ADJUSTED GROSS INCOME</b>	<b>268,700.</b>	<b>232,960.</b>	<b>-35,740.</b>
STANDARD DEDUCTION	24,000.	24,400.	400.
QUALIFIED BUSINESS INCOME DEDUCTION	0.	58.	58.
<b>TOTAL DEDUCTIONS</b>	<b>24,000.</b>	<b>24,458.</b>	<b>458.</b>
<b>TAXABLE INCOME</b>	<b>244,700.</b>	<b>208,502.</b>	<b>-36,198.</b>
TAX	47,289.	37,668.	-9,621.
<b>TAX BEFORE CREDITS</b>	<b>47,289.</b>	<b>37,668.</b>	<b>-9,621.</b>
FORM 1116 (FOREIGN TAX CREDIT)	0.	5.	5.
FORM 5695 (RESIDENTIAL ENERGY CR.)	3,205.	0.	-3,205.
<b>TAX AFTER NON-REFUNDABLE CREDITS</b>	<b>44,084.</b>	<b>37,663.</b>	<b>-6,421.</b>
SCHEDULE SE (SELF-EMPLOYMENT TAX)	94.	121.	27.
FORM 8959 (ADDITIONAL MEDICARE TAX)	245.	0.	-245.
FORM 8960 (NET INVEST. INCOME TAX)	20.	0.	-20.
<b>TOTAL TAX</b>	<b>44,443.</b>	<b>37,784.</b>	<b>-6,659.</b>
FEDERAL INCOME TAX WITHHELD	43,524.	33,599.	-9,925.
ESTIMATED TAX PAYMENTS	3,530.	0.	-3,530.
<b>TOTAL PAYMENTS</b>	<b>47,054.</b>	<b>33,599.</b>	<b>-13,455.</b>
TAX OVERPAID	2,611.	0.	-2,611.
AMOUNT REFUNDED	2,611.	0.	-2,611.
FORM 2210/2210F (EST. TAX PENALTY)	0.	14.	14.
<b>BALANCE DUE (INCLUDING 2210/2210F)</b>	<b>0.</b>	<b>4,199.</b>	<b>4,199.</b>