FORM 6 FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTERESTS 2015

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

FOR OFFICE USE ONLY:

RECEIVED
2016 APR 27 PM 2:27
MIAMI-DADE COUNTY
ELECTIONS DEPARTMENT

LAST NAME — FIRST NAME — MIDDLE NAME:
STUZIN, LAURA ANNE

MAILING ADDRESS:
3100 PONCE DE LEON BLVD -- ROOM 1--6

CORAL GABLES, FL. 33134

CITY : ZIP : COUNTY :

NAME OF AGENCY :
11th JUDICIAL COURT OF FLORIDA

NAME OF OFFICE OR POSITION HELD OR SOUGHT :
COUNTY JUDGE JUDICIAL CIRCUIT (11th)

CHECK IF THIS IS A FILING BY A CANDIDATE ☑

PART A -- NET WORTH

Please enter the value of your net worth as of December 31, 2015 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 31st, 20 15 was $ 15,308,712.80.

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 $ 125,000.00

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
*SEE ATTACHED LIST.	

PART C -- LIABILITIES

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

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
AMERICAN HONDA FINANCE	$15,000.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
N/A	

CE FORM 6 - Effective January 1, 2016
Incorporated by reference in Rule 34-8.002(1), F.A.C.

(Continued on reverse side)

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 2015 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 2015 federal income tax return and all W2's, schedules, and attachments.
[If you check this box and attach a copy of your 2015 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	LA&C LIMITED PARTNERSHIP	LAURA STUZIN 2011 FAMILY TRUST	
ADDRESS OF BUSINESS ENTITY	800 DOUGLAS RD STE500 MIAMI, FL 33134	800 DOUGLAS RD STE500 MIAMI, FL 33134	
PRINCIPAL BUSINESS ACTIVITY	FAMILY PARTNERSHIP	FAMILY TRUST	
POSITION HELD WITH ENTITY	PARTNER	BENEFICIARY	
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS	YES	NO	
NATURE OF MY OWNERSHIP INTEREST	PASSIVE	NOT APPLICABLE	

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ELECTIONS DEPARTMENT

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.

SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

STATE OF FLORIDA
COUNTY OF MIAMI DADE

Sworn to (or affirmed) and subscribed before me this 7th day of MARCH, 20 16 by LAURA ANNE STUZIN.

(Signature of Notary Public--State of Florida)

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

CARIDAD BLANCO
Notary Public - State of Florida
My Comm. Expires Jan 21, 2017
Commission # EE 839011
Bonded Through National Notary Assn.

Personally Known X OR Produced Identification ______

Type of Identification Produced ______

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 ☒

FORM 6
FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTEREST

PART B –ASSETS

DESCRIPTION OF ASSET	VALUE OF ASSET
Home	$1,500,000.00
Dodge and Cox International Stock Fund Index	$28,908.81
CD Ally Bank	$39,980.00
Bank Of America (Checking Account)	$ 12,000.00
Florida Prepaid College	$ 18,720.00
Florida Prepaid College	$ 18,732.00
All Vanguard Holdings	$787,371.99
▪ Traditional IRA ($143,869.54)	
• Child 529 College Savings ($88,801.12)	
• Child 529 College Savings ($80,492.77)	
• 500 Index Fund ($78,843.99)	
• Treasury Money Market ($ 11,384.63)	
• Convertible Security Fund ($3,864.48)	
• High-Yield Tax Exempt Fund ($29,731.73)	
• Limited –Term Tax Exempt Fund ($16,580.52)	
• Prime Money Market Fund ($178,177.32)	
• Tax-Exempt Money Market Fund ($296.33)	
• Stocks:	
▪ Allegion Public LTD ($10,785.99)	
▪ Conocophillips ($5,007.85)	
▪ First Cash Financial Services Inc ($18,680.00)	
▪ HCP Inc. ($8,623.61)	
▪ Ingersoll Rand PLC ($28,694.27)	
▪ Johnson & Johnson ($87,234.24)	
▪ Phillips66 ($5,247.34)	
▪ Walgreen Company ($ 9,056.26)	
LA & C Limited Partnership	$7,425,000.00
Laura Stuzin 2011 Family Trust	$5,350,000.00
GRAND TOTAL :	**$15,198,712.80**

MARCUM
ACCOUNTANTS ▲ ADVISORS

LAURA ANNE STUZIN & DANIEL J. BERNSTEIN
Instructions for Filing Form
8879
2014 IRS e-file Signature Authorization Form for Form 1040

The original Form 8879 should be signed (use full name) and dated by taxpayer and spouse

Return your signed Form 8879 to:

MARCUM LLP
ONE SE THIRD AVENUE, SUITE 1100
MIAMI, FL 33131

Or fax your signed Form 8879 to:

MARCUM LLP
Attn: E-FILE ADMINISTRATOR
305-995-9601

Your return shows a $107,981 overpayment. Of this amount, $0 will be refunded to you. Also, $107,981 has been applied to your 2015 estimated tax.

Form 8879 serves as a replacement for your signature that would be affixed to Form 1040 if you paper filed your return. Please DO NOT separately file Form 1040 with the Internal Revenue Service. Doing so will delay the processing of your return.

We must receive your signed form before we can electronically transmit your return, which is due on October 15, 2015. We would appreciate your returning this form as soon as possible as this will expedite the processing of your return. The Internal Revenue Service will notify us when your return is accepted. Your return is not considered filed until the Internal Revenue Service confirms their acceptance, which may occur after the due date of your return.

When we receive notification that your return has been accepted, we will mail you Form 9325 - Acknowledgment and General Information for Taxpayers Who File Electronically.

MARCUM GROUP
MEMBER

Marcum LLP
Miami ▪ One Southeast Third Avenue ▪ Suite 1100 ▪ Miami, Florida 33131 ▪ **Phone** 305.995.9600 ▪ **Fax** 305.995.9601
Fort Lauderdale ▪ 450 East Las Olas Boulevard ▪ 9th Floor ▪ Fort Lauderdale, Florida 33301 ▪ **Phone** 954.320.8000 ▪ **Fax** 954.320.8001
West Palm Beach ▪ 525 Okeechobee Boulevard ▪ Suite 750 ▪ West Palm Beach, Florida 33401 ▪ **Phone** 561.653.7300 ▪ **Fax** 561.653.7301
marcumllp.com

Form **8879**

Department of the Treasury
Internal Revenue Service

IRS *e-file* Signature Authorization

▶ Do not send to the IRS. This is not a tax return.
▶ Keep this form for your records.
▶ Information about Form 8879 and its instructions is at *www.irs.gov/form8879.*

OMB No. 1545-0074

2014

Submission Identification Number (SID) ▶

Taxpayer's name: LAURA ANNE STUZIN

Social security number:

Spouse's name: DANIEL J BERNSTEIN

Spouse's social security number: [redacted]

Part I Tax Return Information - Tax Year Ending December 31, 2014 (Whole Dollars Only)

1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4)	1	427,509.
2	Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12)	2	103,694.
3	Federal income tax withheld (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7)	3	39,856.
4	Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a)	4	
5	Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14)	5	

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

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2014, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from 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 MARCUM, LLP (ERO firm name) to enter or generate my PIN [redacted] (Enter five digits, but do not enter all zeros) as my signature on my tax year 2014 electronically filed income tax return.

☐ I will enter my PIN as my signature on my tax year 2014 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 ▶ TAXPAYER'S COPY Date ▶

Spouse's PIN: check one box only

☒ I authorize MARCUM, LLP (ERO firm name) to enter or generate my PIN [redacted] (Enter five digits, but do not enter all zeros) as my signature on my tax year 2014 electronically filed income tax return.

☐ I will enter my PIN as my signature on my tax year 2014 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 ▶ Date ▶

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. [redacted] (Do not enter all zeros)

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2014 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 **Publication 1345**, Handbook for Authorized IRS *e-file* Providers of Individual Income Tax Returns.

ERO's signature ▶ Date ▶

ERO Must Retain This Form - See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So

For Paperwork Reduction Act Notice, see your tax return instructions. Form **8879** (2014)

JSA
4A0145 2.000

a Employee's social security number	OMB No. 1545-0008	This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

b Employer identification number (EIN) [redacted]	1 Wages, tips, other compensation 88,772.	2 Federal income tax withheld 18,554.
c Employer's name, address, and ZIP code RUMBERGER, KIRK & CALDWEL PO BOX 1873-201 S ORANGE ORLANDO FL 32802	3 Social security wages 95,454.	4 Social security tax withheld 5,918.
	5 Medicare wages and tips 95,454.	6 Medicare tax withheld 1,384.
	7 Social security tips	8 Allocated tips
d Control number	9	10 Dependent care benefits
e Employee's first name and initial Last name Suff. LAURA ANNE STUZIN	11 Nonqualified plans	12a See instructions for box 12 Code D 6,682.
[redacted]	13 Statutory employee ☐ Retirement plan ☒ Third-party sick pay ☐	12b Code
	14 Other	12c Code
f Employee's address and ZIP code		12d Code

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc	19 Local income tax	20 Locality name
FL						

Form **W-2** Wage and Tax Statement **2014** Department of the Treasury–Internal Revenue Service

Copy C - For EMPLOYEE'S RECORDS (see Notice to Employee on back of Copy B.)

Safe, accurate, FAST! Use IRS e-file

Do Not Cut, Fold, or Staple Forms on This Page

FOR REVIEW ONLY -- DO NOT SEND TO THE IRS. IF RETURN IS FILED ELECTRONICALLY, THE ABOVE INFORMATION MUST BE THE SAME AS PRINTED ON THE ORIGINAL FORM.

a Employee's social security number

OMB No. 1545-0008

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

b Employer identification number (EIN) [redacted]

c Employer's name, address, and ZIP code

DEPARTMENT OF JUSTICE
USDA, NAT. FIN. CTER. PO BOX 6
NEW ORLEANS LA 70160

d Control number

e Employee's first name and initial Last name Suff.

DANIEL J BERNSTEIN

f Employee's address and ZIP code

1 Wages, tips, other compensation 142,609.	2 Federal income tax withheld 21,302.
3 Social security wages 117,000.	4 Social security tax withheld 7,254.
5 Medicare wages and tips 154,035.	6 Medicare tax withheld 2,233.
7 Social security tips	8 Allocated tips
9	10 Dependent care benefits
11 Nonqualified plans	12a See instructions for box 12 Code D 11,426.
13 Statutory employee ☐ Retirement plan ☒ Third-party sick pay ☐	12b Code DD 16,673.
14 Other NT HEALTH 5,320.	12c Code
	12d Code

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc	19 Local income tax	20 Locality name

Form **W-2** **Wage and Tax Statement** 2014 Department of the Treasury–Internal Revenue Service

Copy C - For EMPLOYEE'S RECORDS (see Notice to Employee on back of Copy B.)

Safe, accurate, FAST! Use IRS e-file

Do Not Cut, Fold, or Staple Forms on This Page

FOR REVIEW ONLY -- DO NOT SEND TO THE IRS. IF RETURN IS FILED ELECTRONICALLY, THE ABOVE INFORMATION MUST BE THE SAME AS PRINTED ON THE ORIGINAL FORM.

Form **1040** Department of the Treasury - Internal Revenue Service (99)
U.S. Individual Income Tax Return 2014 OMB No. 1545-0074 IRS Use Only - Do not write or staple in this space.

For the year Jan. 1-Dec. 31, 2014, or other tax year beginning , 2014, ending , 20 See separate instructions.

Your first name and initial: LAURA ANNE
Last name: STUZIN
Your social security number:

If a joint return, spouse's first name and initial: DANIEL J
Last name: BERNSTEIN
Spouse's social security number:

Home address (number and street). If you have a P.O. box, see instructions. [redacted]
Apt. no.

▲ Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).

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

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

Filing Status

Check only one box.

1 ☐ Single
2 ☒ Married filing jointly (even if only one had income)
3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶
4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child

Exemptions

6a ☒ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a
b ☒ Spouse

Boxes checked on 6a and 6b: 2

c Dependents:

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if child under age 17 qualifying for child tax credit (see instructions)
BERNSTEIN	[redacted]	SON	☒
BERNSTEIN	[redacted]	SON	☒
			☐
			☐

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

No. of children on 6c who:
- lived with you: 2
- did not live with you due to divorce or separation (see instructions):

Dependents on 6c not entered above:

d Total number of exemptions claimed — Add numbers on lines above ▶ 4

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

If you did not get a W-2, see instructions.

7	Wages, salaries, tips, etc. Attach Form(s) W-2 . . . STMT 1		7	231,381.
8a	**Taxable** interest. Attach Schedule B if required		8a	10,826.
b	**Tax-exempt** interest. **Do not** include on line 8a . . STMT 1	8b 78,040.		
9a	Ordinary dividends. Attach Schedule B if required		9a	107,706.
b	Qualified dividends . . . STMT 2	9b 75,715.		
10	Taxable refunds, credits, or offsets of state and local income taxes		10	
11	Alimony received		11	
12	Business income or (loss). Attach Schedule C or C-EZ		12	
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐		13	60,443.
14	Other gains or (losses). Attach Form 4797		14	69,194.
15a	IRA distributions	15a	15b b Taxable amount	
16a	Pensions and annuities	16a	16b b Taxable amount	
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		17	-59,476.
18	Farm income or (loss). Attach Schedule F		18	
19	Unemployment compensation		19	
20a	Social security benefits	20a	20b b Taxable amount	
21	Other income. List type and amount SEE STATEMENT 3		21	8,000.
22	Combine the amounts in the far right column for lines 7 through 21. This is your **total income** ▶		22	428,074.

Adjusted Gross Income

23	Educator expenses	23		
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24		
25	Health savings account deduction. Attach Form 8889	25		
26	Moving expenses. Attach Form 3903	26		
27	Deductible part of self-employment tax. Attach Schedule SE	27	565.	
28	Self-employed SEP, SIMPLE, and qualified plans	28		
29	Self-employed health insurance deduction	29		
30	Penalty on early withdrawal of savings	30		
31a	Alimony paid b Recipient's SSN ▶	31a		
32	IRA deduction	32		
33	Student loan interest deduction	33		
34	Tuition and fees. Attach Form 8917	34		
35	Domestic production activities deduction. Attach Form 8903	35		
36	Add lines 23 through 35		36	565.
37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶		37	427,509.

JSA **For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.** Form **1040** (2014)
4A1210 2.000

Form 1040 (2014) LAURA ANNE STUZIN & DANIEL J BERNSTEIN Page **2**

Tax and Credits	38	Amount from line 37 (adjusted gross income)			38	427,509.
	39a	Check if: ☐ **You** were born before January 2, 1950, ☐ Blind. ☐ **Spouse** was born before January 2, 1950, ☐ Blind. **Total boxes checked** ▶ 39a ☐				
	b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b ☐				
Standard Deduction for - • People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions. • All others: Single or Married filing separately, $6,200 Married filing jointly or Qualifying widow(er), $12,400 Head of household, $9,100	40	**Itemized deductions** (from Schedule A) or your **standard deduction** (see left margin)			40	40,968.
	41	Subtract line 40 from line 38			41	386,541.
	42	**Exemptions.** If line 38 is $152,525 or less, multiply $3,950 by the number on line 6d. Otherwise, see instructions			42	316.
	43	**Taxable income.** Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-			43	386,225.
	44	**Tax** (see instructions). Check if any from: a ☐ Form(s) 8814 b ☐ Form 4972 c ☐			44	78,851.
	45	**Alternative minimum tax** (see instructions). Attach Form 6251			45	10,735.
	46	Excess advance premium tax credit repayment. Attach Form 8962			46	
	47	Add lines 44, 45, and 46 ▶			47	89,586.
	48	Foreign tax credit. Attach Form 1116 if required	48	855.		
	49	Credit for child and dependent care expenses. Attach Form 2441	49			
	50	Education credits from Form 8863, line 19	50			
	51	Retirement savings contributions credit. Attach Form 8880	51			
	52	Child tax credit. Attach Schedule 8812, if required	52			
	53	Residential energy credits. Attach Form 5695	53			
	54	Other credits from Form: a ☐ 3800 b ☐ 8801 c ☐	54			
	55	Add lines 48 through 54. These are your **total credits**			55	855.
	56	Subtract line 55 from line 47. If line 55 is more than line 47, enter -0- ▶			56	88,731.
Other Taxes	57	Self-employment tax. Attach Schedule SE			57	1,130.
	58	Unreported social security and Medicare tax from Form: **a** ☐ 4137 **b** ☐ 8919			58	
	59	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required			59	
	60a	Household employment taxes from Schedule H			60a	7,514.
	b	First-time homebuyer credit repayment. Attach Form 5405 if required			60b	
	61	Health care: individual responsibility (see instructions) Full-year coverage ☒			61	
	62	Taxes from: a ☒ Form 8959 b ☒ Form 8960 c ☐ Instructions; enter code(s)			62	6,319.
	63	Add lines 56 through 62. This is your **total tax** ▶			63	103,694.
Payments	64	Federal income tax withheld from Forms W-2 and 1099	64	39,856.		
	65	2014 estimated tax payments and amount applied from 2013 return	65	151,819.		
If you have a qualifying child, attach Schedule EIC.	66a	**Earned income credit (EIC)**	66a			
	b	Nontaxable combat pay election 66b				
	67	Additional child tax credit. Attach Schedule 8812	67			
	68	American opportunity credit from Form 8863, line 8	68			
	69	Net premium tax credit. Attach Form 8962	69			
	70	Amount paid with request for extension to file	70	20,000.		
	71	Excess social security and tier 1 RRTA tax withheld	71			
	72	Credit for federal tax on fuels. Attach Form 4136	72			
	73	Credits from Form: a ☐ 2439 b ☐ Reserved c ☐ Reserved d ☐	73			
	74	Add lines 64, 65, 66a, and 67 through 73. These are your **total payments** ▶			74	211,675.
Refund	75	If line 74 is more than line 63, subtract line 63 from line 74. This is the amount you **overpaid**			75	107,981.
	76a	Amount of line 75 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐			76a	
Direct deposit? See instructions.	▶ b	Routing number ▶ c Type: ☐ Checking ☐ Savings				
	▶ d	Account number				
	77	Amount of line 75 you want **applied to your 2015 estimated tax** ▶	77	107,981.		
Amount You Owe	78	**Amount you owe.** Subtract line 74 from line 63. For details on how to pay, see instructions ▶			78	
	79	Estimated tax penalty (see instructions)	79			

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 ▶ MICHAEL H NOVAK Phone no. ▶ 305-995-9600 Personal identification number (PIN) ▶ [redacted]

Sign Here

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

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

Your signature	Date	Your occupation ATTORNEY	Daytime phone number
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation ATTORNEY	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Paid Preparer Use Only

Print/Type preparer's name MICHAEL H NOVAK	Preparer's signature	Date	Check ☐ if self-employed	PTIN P01074800
Firm's name ▶ MARCUM, LLP			Firm's EIN ▶ [redacted]	
Firm's address ▶ ONE SE THIRD AVENUE, SUITE 1100 MIAMI, FL 33131			Phone no.	305-995-9600

SCHEDULE A
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Itemized Deductions

▶ Information about Schedule A and its separate instructions is at *www.irs.gov/schedulea.*

▶ Attach to Form 1040.

OMB No. 1545-0074

2014

Attachment Sequence No. **07**

Name(s) shown on Form 1040: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Your social security number

Medical and Dental Expenses		**Caution.** Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1			
	2	Enter amount from Form 1040, line 38 [2]				
	3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1950, multiply line 2 by 7.5% (.075) instead	3			
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	
Taxes You Paid	5	State and local (**check only one box**): a ☐ Income taxes, or b ☒ General sales taxes ..... STMT. 4	5	3,130.		
	6	Real estate taxes (see instructions) ..... STMT. 4	6	14,911.		
	7	Personal property taxes	7			
	8	Other taxes. List type and amount ▶	8			
	9	Add lines 5 through 8			9	18,041.
Interest You Paid **Note.** Your mortgage interest deduction may be limited (see instructions).	10	Home mortgage interest and points reported to you on Form 1098	10			
	11	Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address ▶	11			
	12	Points not reported to you on Form 1098. See instructions for special rules	12			
	13	Mortgage insurance premiums (see instructions)	13			
	14	Investment interest. Attach Form 4952 if required. (See instructions.)	14	12,686.		STMT 4
	15	Add lines 10 through 14			15	12,686.
Gifts to Charity If you made a gift and got a benefit for it, see instructions.	16	Gifts by cash or check. If you made any gift of $250 or more, see instructions . . SEE. STATEMENT .4	16	2,562.		
	17	Other than by cash or check. If any gift of $250 or more, see instructions. You **must** attach Form 8283 if over $500	17			
	18	Carryover from prior year	18			
	19	Add lines 16 through 18			19	2,562.
Casualty and Theft Losses	20	Casualty or theft loss(es). Attach Form 4684. (See instructions.)			20	
Job Expenses and Certain Miscellaneous Deductions	21	Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ▶	21			
	22	Tax preparation fees	22			
	23	Other expenses - investment, safe deposit box, etc. List type and amount ▶ SEE STATEMENT 5	23	19,903.		
	24	Add lines 21 through 23	24	19,903.		
	25	Enter amount from Form 1040, line 38 [25] 427,509.				
	26	Multiply line 25 by 2% (.02)	26	8,550.		
	27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-			27	11,353.
Other Miscellaneous Deductions	28	Other - from list in instructions. List type and amount ▶			28	
Total Itemized Deductions	29	Is Form 1040, line 38, over $152,525? SEE STMT 6 ☐ **No.** Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. ☒ **Yes.** Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.			29	40,968.
	30	If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ ☐				

For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule A (Form 1040) 2014

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SCHEDULE B
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)

Interest and Ordinary Dividends

▶ Attach to Form 1040A or 1040.
▶ Information about Schedule B and its instructions is at *www.irs.gov/scheduleb.*

OMB No. 1545-0074
2014
Attachment Sequence No. 08

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Your social security number:

Part I Interest

(See instructions on back and the instructions for Form 1040A, or Form 1040, line 8a.)

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.

			Amount
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 instructions on back and list this interest first. Also, show that buyer's social security number and address ▶	1	
	SEE STATEMENT 7		10,826.
2	Add the amounts on line 1	2	10,826.
3	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3	
4	Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶	4	10,826.

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

Part II Ordinary Dividends

(See instructions on back and the instructions for Form 1040A, or Form 1040, line 9a.)

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.

			Amount
5	List name of payer ▶	5	
	SEE STATEMENT 9		107,706.
6	Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶	6	107,706.

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

Part III Foreign Accounts and Trusts

(See instructions on back.)

		Yes	No
	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.		
7a	At any time during 2014, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions		X
	If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		
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 2014, 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 on back		X

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

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Capital Gains and Losses

▶ Attach to Form 1040 or Form 1040NR.
▶ Information about Schedule D and its separate instructions is at *www.irs.gov/scheduled.*
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074
2014
Attachment Sequence No. **12**

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Your social security number:

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

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	79,449.	84,933.	11.	-5,473.
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 SEE STATEMENT 10	5	-54,724.
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your **Capital Loss Carryover Worksheet** in the instructions	6	( )
7 **Net short-term capital gain or (loss).** Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back	7	-60,197.

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

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	12,936.	10,362.		2,574.
9 Totals for all transactions reported on Form(s) 8949 with **Box E** checked	19,098.	26,104.		-7,006.
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	NONE
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 STMT 11	12	124,460.
13 Capital gain distributions. See the instructions STMT 12	13	612.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your **Capital Loss Carryover Worksheet** in the instructions	14	( )
15 **Net long-term capital gain or (loss).** Combine lines 8a through 14 in column (h). Then go to Part III on the back	15	120,640.

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

Schedule D (Form 1040) 2014

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LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Part III Summary

16 Combine lines 7 and 15 and enter the result . . . . 16 60,443.

- If line 16 is a **gain,** enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below.
- If line 16 is a **loss,** skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.
- If line 16 is **zero,** skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22.

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

☒ **Yes.** Go to line 18.

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

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

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

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

☒ **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). **Do not** complete lines 21 and 22 below.

☐ **No.** Complete the **Schedule D Tax Worksheet** in the instructions. **Do not** complete lines 21 and 22 below.

21 If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the **smaller** of:

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

} . . . . 21 (   )

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

22 Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b?

☐ **Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42).

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

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Qualified Dividends and Capital Gain Tax Worksheet - Line 44

Keep for Your Records

Before you begin:
- ✓ See the earlier instructions for line 44 to see if you can use this worksheet to figure your tax.
- ✓ Before completing this worksheet, complete Form 1040 through line 43.
- ✓ If you do not have to file Schedule D and you received capital gain distributions, be sure you checked the box on line 13 of Form 1040.

1. Enter the amount from Form 1040, line 43. However, if you are filing Form 2555 or 2555-EZ (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet . . . . 1. 386,225.
2. Enter the amount from Form 1040, line 9b* . . . . 2. 75,715.
3. Are you filing Schedule D?*
   - ☒ **Yes.** Enter the **smaller** of line 15 or 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0-
   - ☐ **No.** Enter the amount from Form 1040, line 13

   3. 60,443.
4. Add lines 2 and 3 . . . . 4. 136,158.
5. If filing Form 4952 (used to figure investment interest expense deduction), enter any amount from line 4g of that form. Otherwise, enter -0- . . . . 5. NONE
6. Subtract line 5 from line 4. If zero or less, enter -0- . . . . 6. 136,158.
7. Subtract line 6 from line 1. If zero or less, enter -0- . . . . 7. 250,067.
8. Enter:
   $36,900 if single or married filing separately,
   $73,800 if married filing jointly or qualifying widow(er),
   $49,400 if head of household.
   . . . . 8. 73,800.
9. Enter the smaller of line 1 or line 8 . . . . 9. 73,800.
10. Enter the smaller of line 7 or line 9 . . . . 10. 73,800.
11. Subtract line 10 from line 9. This amount is taxed at 0% . . . . 11.
12. Enter the smaller of line 1 or line 6 . . . . 12. 136,158.
13. Enter the amount from line 11 . . . . 13.
14. Subtract line 13 from line 12 . . . . 14. 136,158.
15. Enter:
    $406,750 if single,
    $228,800 if married filing separately,
    $457,600 if married filing jointly or qualifying widow(er),
    $432,200 if head of household.
    . . . . 15. 457,600.
16. Enter the smaller of line 1 or line 15 . . . . 16. 386,225.
17. Add lines 7 and 11 . . . . 17. 250,067.
18. Subtract line 17 from line 16. If zero or less, enter -0- . . . . 18. 136,158.
19. Enter the smaller of line 14 or line 18 . . . . 19. 136,158.
20. Multiply line 19 by 15% (.15) . . . . 20. 20,424.
21. Add lines 11 and 19 . . . . 21. 136,158.
22. Subtract line 21 from line 12 . . . . 22.
23. Multiply line 22 by 20% (.20) . . . . 23.
24. Figure the tax on the amount on line 7. If the amount on line 7 is less than $100,000, use the Tax Table to figure the tax. If the amount on line 7 is $100,000 or more, use the Tax Computation Worksheet . . . . 24. 58,427.
25. Add lines 20, 23, and 24 . . . . 25. 78,851.
26. Figure the tax on the amount on line 1. If the amount on line 1 is less than $100,000, use the Tax Table to figure this tax. If the amount on line 1 is $100,000 or more, use the Tax Computation Worksheet . . . . 26. 103,359.
27. **Tax on all taxable income.** Enter the **smaller** of line 25 or line 26. Also include this amount on Form 1040, line 44. If you are filing Form 2555 or 2555-EZ, do not enter this amount on Form 1040, line 44. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet . . . . 27. 78,851.

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

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Unrecaptured Section 1250 Gain Worksheet - Line 19 *Keep for Your Records*

If you are not reporting a gain on Form 4797, line 7, skip lines 1 through 9 and go to line 10.

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 (but not on Form 6252), 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. If you had more than one such property, see instructions . . 1. ______
2. Enter the amount from Form 4797, line 26g, for the property for which you made an entry on line 1 . . . 2. ______
3. Subtract line 2 from line 1 . . . . 3. ______
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 (see instructions) . . . . 4. ______
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" . . . . 5. 9,163.
6. Add lines 3 through 5 . . . . 6. 9,163.
7. Enter the **smaller** of line 6 or the gain from Form 4797, line 7 . . . . 7. 9,163.
8. Enter the amount, if any, from Form 4797, line 8 . . . . 8. 92,422.
9. Subtract line 8 from line 7. If zero or less, enter -0- . . . . 9. ______
10. Enter the amount of any gain from the sale or exchange of an interest in a partnership attributable to unrecaptured section 1250 gain (see instructions) . . . . 10. ______
11. Enter the total of any amounts reported to you as "unrecaptured section 1250 gain" on a Schedule K-1, Form 1099-DIV, or Form 2439 from an estate, trust, real estate investment trust, or mutual fund (or other regulated investment company) or in connection with a Form 1099-R . . . . 11. 7.
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 (see instructions) . . . . 12. ______
13. Add lines 9 through 12 . . . . 13. 7.
14. If you had any section 1202 gain or collectibles gain or (loss), enter the total of lines 1 through 4 of the **28% Rate Gain Worksheet**. Otherwise, enter -0- . . . 14. ______
15. Enter the (loss), if any, from Schedule D, line 7. If Schedule D, line 7, is zero or a gain, enter -0- 15. (60,197.)
16. Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), box 11, code C* . . . . 16. ( )
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- . . . . 17. 60,197.
18. **Unrecaptured section 1250 gain.** 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 . . . . 18. ______

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*If you are filing Form 2555 or 2555-EZ (relating to foreign earned income), see the footnote in the Foreign Earned Income Tax Worksheet in the Form 1040 instructions before completing this line.

Form **8949**

Department of the Treasury
Internal Revenue Service

Sales and Other Dispositions of Capital Assets

▶ Information about Form 8949 and its separate instructions is at *www.irs.gov/form8949*.

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

OMB No. 1545-0074

2014

Attachment Sequence No. **12A**

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Social security number or taxpayer identification number:

Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments your bought in 2014 or later).

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

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

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

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions	**Adjustment, if any, to gain or loss.** If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
SEE FORM 8949 DETAIL							
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 1b** (if **Box A** above is checked), **line 2** (if **Box B** above is checked), or **line 3** (if **Box C** above is checked) ▶			79,449.	84,933.		11.	-5,473.

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

For Paperwork Reduction Act Notice, see your tax return instructions.
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Form **8949** (2014)

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

(a) Description of property FORM 8949 SHORT-TERM BOX A	(b) Date acquired	(c) Date sold	(d) Proceeds (sales price)	(e) Cost or other basis	(f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss)
T ROWE PRICE FLTG RATE FD INC	12/24/2013	12/16/2014	25,000.	25,921.		11.	-910.
WISDOMTREE JAPAN HEDGED EQUITY FUND	11/11/2014	11/17/2014	10,746.	10,871.			-125.
[redacted] AMERN RLTY CAP PPTYS INC CO	01/28/2014	06/03/2014	43,353.	47,811.			-4,458.
SYSCO CORP	VARIOUS	09/23/2014	350.	330.			20.
TOTALS			79,449.	84,933.		11.	-5,473.

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side	Social security number or taxpayer identification number
LAURA ANNE STUZIN & DANIEL J BERNSTEIN	

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

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

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

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

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

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	(g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
SEE FORM 8949 DETAIL							
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) ▶			12,936.	10,362.			2,574.

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

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

(a) Description of property FORM 8949 LONG-TERM BOX D	(b) Date acquired	(c) Date sold	(d) Proceeds (sales price)	(e) Cost or other basis	(f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss)
SYSCO CORP	VARIOUS	09/23/2014	954.	805.			149.
WALT DISNEY CO	06/28/2013	10/16/2014	11,982.	9,557.			2,425.
TOTALS.			12,936.	10,362.			2,574.

JSA

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side | **Social security number or taxpayer identification number**

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

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

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

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

☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☒ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1 (a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the **Note** below and see *Column (e)* in the separate instructions	**Adjustment, if any, to gain or loss.** If you enter an amount in column (g), enter a code in column (f). **See the separate instructions.** (f) Code(s) from instructions	 (g) Amount of adjustment	(h) **Gain or (loss).** Subtract column (e) from column (d) and combine the result with column (g)
SEE FORM 8949 DETAIL							
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, **line 8b** (if **Box D** above is checked), **line 9** (if **Box E** above is checked), or **line 10** (if **Box F** above is checked) ▶			19,098.	26,104.			-7,006.

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

Form **8949** (2014)

JSA
4X2616 2.000

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

(a) Description of property FORM 8949 LONG-TERM BOX E	(b) Date acquired	(c) Date sold	(d) Proceeds (sales price)	(e) Cost or other basis	(f) Code(s) from instructions	(g) Amount of adjustment	(h) Gain or (loss)
ALLIED IRISH BANKS PLC SPONSORD ADR	11/09/2007	08/15/2014	49.	8,864.			-8,815.
[redacted] MFC MFS INTER INC TR CLOSED	01/06/2010	03/20/2014	11,316.	12,315.			-999.
SYSCO CORP	VARIOUS	09/23/2014	7,733.	4,925.			2,808.
TOTALS			19,098.	26,104.			-7,006.

SCHEDULE E
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

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

▶ Information about Schedule E and its separate instructions is at *www.irs.gov/schedulee*.

OMB No. 1545-0074

2014

Attachment
Sequence No. **13**

Name(s) shown on return	Your social security number
LAURA ANNE STUZIN & DANIEL J BERNSTEIN	

Part I **Income or Loss From Rental Real Estate and Royalties** **Note.** If you are in the business of renting personal property, use **Schedule C** or **C-EZ** (see instructions). If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

A	Did you make any payments in 2014 that would require you to file Form(s) 1099? (see instructions)	☐ Yes	☐ No
B	If "Yes," did you or will you file required Forms 1099?	☐ Yes	☐ No

1a	Physical address of each property (street, city, state, ZIP code)
A	L.A. & C - CITLO I - DERNS MARKET OPP
B	
C	

1b	Type of Property (from list below)
A	
B	
C	

2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the **QJV** box only if you meet the requirements to file as a qualified joint venture. See instructions.

	Fair Rental Days	Personal Use Days	QJV
A			☐
B			☐
C			☐

Type of Property:

1 Single Family Residence	3 Vacation/Short-Term Rental	5 Land	7 Self-Rental
2 Multi-Family Residence	4 Commercial	6 Royalties	8 Other (describe)

Income: Properties:		A	B	C
3 Rents received	3			
4 Royalties received	4	9.		
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions	8			
9 Insurance	9			
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13			
14 Repairs	14			
15 Supplies	15			
16 Taxes	16			
17 Utilities	17			
18 Depreciation expense or depletion	18			
19 Other (list) ▶	19			
20 Total expenses. Add lines 5 through 19	20			
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file **Form 6198**	21	9.		
22 Deductible rental real estate loss after limitation, if any, on **Form 8582** (see instructions)	22	( )	( )	( )

23a Total of all amounts reported on line 3 for all rental properties	23a	
b Total of all amounts reported on line 4 for all royalty properties	23b	9.
c Total of all amounts reported on line 12 for all properties	23c	
d Total of all amounts reported on line 18 for all properties	23d	
e Total of all amounts reported on line 20 for all properties	23e	1.

24 **Income.** Add positive amounts shown on line 21. **Do not** include any losses	24	9.
25 **Losses.** Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here.	25	(1.)
26 **Total rental real estate and royalty income or (loss).** Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26	8.

For Paperwork Reduction Act Notice, see the separate instructions.

Schedule E (Form 1040) 2014

JSA
4X1300 1.000

Name(s) shown on return. Do not enter name and social security number if shown on other side.	Your social security number
LAURA ANNE STUZIN & DANIEL J BERNSTEIN	

Caution. The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

Part II Income or Loss From Partnerships and S Corporations

Note. If you report a loss from an at-risk activity for which any amount is **not** at risk, you **must** check the box in column **(e)** on line 28 and attach **Form 6198.** See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk, excess farm loss, or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section. ☒ Yes ☐ No

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if any amount is not at risk
A	SEE STATEMENT 13				
B					
C					
D					

	STMT 16 Passive Income and Loss		STMT 27 Nonpassive Income and Loss		
	(f) Passive loss allowed (attach Form 8582 if required)	(g) Passive income from Schedule K-1	(h) Nonpassive loss from Schedule K-1	(i) Section 179 expense deduction from Form 4562	(j) Nonpassive income from Schedule K-1
A					
B					
C					
D					
29a Totals		73,218.			9.
b Totals	132,711.				

30 Add columns (g) and (j) of line 29a	30	73,227.
31 Add columns (f), (h), and (i) of line 29b	31	(132,711.)
32 **Total partnership and S corporation income or (loss).** Combine lines 30 and 31. Enter the result here and include in the total on line 41 below.	32	-59,484.

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A	IRREV. INSURANCE TRUST	
B	QUALIFIED PERSONAL TRUST	[redacted]

	Passive Income and Loss		Nonpassive Income and Loss	
	(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A		NONE		
B		NONE		
34a Totals		NONE		
b Totals				

35 Add columns (d) and (f) of line 34a	35	NONE
36 Add columns (c) and (e) of line 34b	36	( )
37 **Total estate and trust income or (loss).** Combine lines 35 and 36. Enter the result here and include in the total on line 41 below	37	NONE

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

38 (a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b

39 Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below	39	

Part V Summary

40 Net farm rental income or (loss) from **Form 4835.** Also, complete line 42 below	40	
41 **Total income or (loss).** Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17, or Form 1040NR, line 18 ▶	41	-59,476.
42 **Reconciliation of farming and fishing income.** Enter your **gross** farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120S), box 17, code V; and Schedule K-1 (Form 1041), box 14, code F (see instructions)	42	
43 **Reconciliation for real estate professionals.** If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040 or Form 1040NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Schedule E (Form 1040) 2014

SCHEDULE SE
(Form 1040)
Department of the Treasury
Internal Revenue Service (99)

Self-Employment Tax

▶ Information about Schedule SE and its separate instructions is at *www.irs.gov/schedulese.*
▶ Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074
2014
Attachment Sequence No. **17**

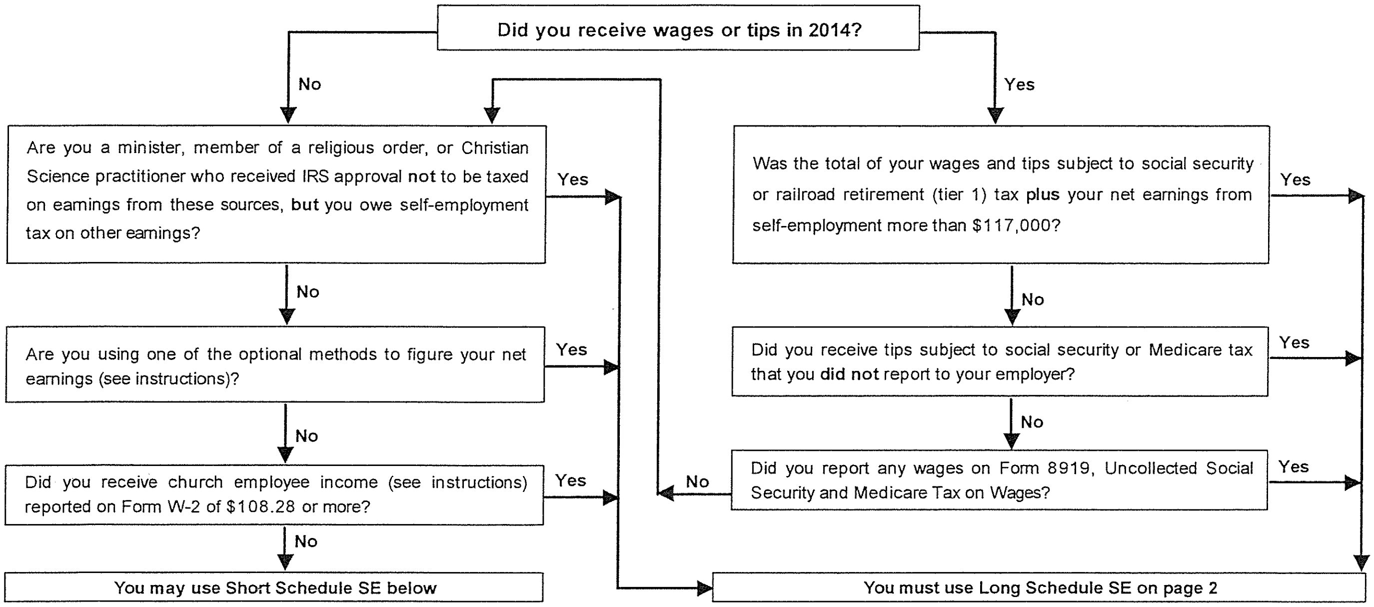
Name of person with **self-employment** income (as shown on Form 1040 or Form 1040NR): LAURA ANNE STUZIN

Social security number of person with **self-employment** income ▶

Before you begin: To determine if you must file Schedule SE, see the instructions.

May I Use Short Schedule SE or Must I Use Long Schedule SE?

Note. Use this flowchart **only if** you must file Schedule SE. If unsure, see *Who Must File Schedule SE* in the instructions.



Section A - Short Schedule SE. Caution. Read above to see if you can use Short Schedule SE.

1a	Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A	1a	
b	If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Z	1b	( )
2	Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report SEE STATEMENT 32	2	8,000.
3	Combine lines 1a, 1b, and 2	3	8,000.
4	Multiply line 3 by 92.35% (.9235). If less than $400, you do not owe self-employment tax; **do not** file this schedule unless you have an amount on line 1b ▶	4	7,388.
	Note. If line 4 is less than $400 due to Conservation Reserve Program payments on line 1b, see instructions.		
5	**Self-employment tax.** If the amount on line 4 is: • $117,000 or less, multiply line 4 by 15.3% (.153). Enter the result here and on **Form 1040, line 57,** or **Form 1040NR, line 55** • More than $117,000, multiply line 4 by 2.9% (.029). Then, add $14,508 to the result. Enter the total here and on **Form 1040, line 57,** or **Form 1040NR, line 55**	5	1,130.
6	**Deduction for one-half of self-employment tax.** Multiply line 5 by 50% (.50). Enter the result here and on **Form 1040, line 27,** or **Form 1040NR, line 27** — 6 — 565.		

For Paperwork Reduction Act Notice, see your tax return instructions. **Schedule SE (Form 1040) 2014**

Form **1116**

Department of the Treasury
Internal Revenue Service (99)

Foreign Tax Credit

(Individual, Estate, or Trust)

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

▶ Information about Form 1116 and its separate instructions is at *www.irs.gov/form1116.*

OMB No. 1545-0121

2014

Attachment
Sequence No. 19

Name LAURA ANNE STUZIN
DANIEL J BERNSTEIN

Identifying number as shown on page 1 of your tax return

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 ☒ Passive category income c ☐ Section 901(j) income e ☐ Lump-sum distributions
b ☐ General category income d ☐ Certain income re-sourced by treaty

f Resident of (name of country) ▶

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
	A	B	C		(Add cols. A, B, and C.)
g Enter the name of the foreign country or U.S. possession ▶	OTHER COUNTRIES				
1a Gross income from sources within country shown above and of the type checked above (see instructions):	3,596.			1a	3,596.
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). ▶ ☐					
Deductions and losses (*Caution: See instructions*):					SEE SOURCING STATEMENT
2 Expenses **definitely related** to the income on line 1a (attach statement)	3.				
3 Pro rata share of other deductions **not definitely related:**					
a Certain itemized deductions or standard deduction (see instructions)	26,015.				
b Other deductions (attach statement)					
c Add lines 3a and 3b	26,015.				
d Gross foreign source income (see instructions)	4,159.				
e Gross income from all sources (see instructions)	626,835.				
f Divide line 3d by line 3e (see instructions)	0.00663492				
g Multiply line 3c by line 3f	173.				
4 Pro rata share of interest expense (see instructions):					
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	176.			6	176.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2. ▶				7	3,420.

Part II Foreign Taxes Paid or Accrued (see instructions)

Country	Credit is claimed for taxes (you must check one) (h) ☒ Paid (i) ☐ Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(n) Other foreign taxes paid or accrued	Taxes withheld at source on:			(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
	(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest		(o) Dividends	(p) Rents and royalties	(q) Interest		
A	1099 TAX					69.			477.	546.
B										
C										

8 **Add lines A through C, column (s). Enter the total here and on line 9, page 2** ▶ 8 546.

For Paperwork Reduction Act Notice, see instructions.

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	546.		
10	Carryback or carryover (attach detailed computation) STMT 35	10	309.		
11	Add lines 9 and 10	11	855.		
12	Reduction in foreign taxes (see instructions)	12	( )		
13	Taxes reclassified under high tax kickout (see instructions)	13			
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit			14	855.
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 (see instructions)	15	3,420.		
16	Adjustments to line 15 (see instructions)	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	3,420.		
18	**Individuals:** Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. **Estates and trusts:** Enter your taxable income without the deduction for your exemption SEE STATEMENT 36	18	301,960.		
	Caution: *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"			19	0.01132600
20	**Individuals:** Enter the amounts from Form 1040, lines 44 and 46. If you are a nonresident alien, enter the amounts from Form 1040NR, 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 36 and 37			20	78,851.
	Caution: *If you are completing line 20 for separate category* **e** *(lump-sum distributions), see instructions.*				
21	Multiply line 20 by line 19 (maximum amount of credit)			21	893.
22	Enter the **smaller** of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV (see instructions) ▶			22	855.

Part IV Summary of Credits From Separate Parts III (see instructions)

23	Credit for taxes on passive category income	23			
24	Credit for taxes on general category income	24			
25	Credit for taxes on certain income re-sourced by treaty	25			
26	Credit for taxes on lump-sum distributions	26			
27	Add lines 23 through 26			27	
28	Enter the **smaller** of line 20 or line 27			28	855.
29	Reduction of credit for international boycott operations. See instructions for line 12			29	
30	Subtract line 29 from line 28. This is your **foreign tax credit.** Enter here and on Form 1040, line 48; Form 1040NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a ▶			30	855.

Form **1116** (2014)

Form **1116**

Department of the Treasury
Internal Revenue Service (99)

ALTERNATIVE MINIMUM TAX

Foreign Tax Credit

(Individual, Estate, or Trust)

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

▶ Information about Form 1116 and its separate instructions is at *www.irs.gov/form1116.*

OMB No. 1545-0121

2014

Attachment Sequence No. **19**

Name LAURA ANNE STUZIN
DANIEL J BERNSTEIN

Identifying number as shown on page 1 of your tax return

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 ☒ Passive category income
b ☐ General category income
c ☐ Section 901(j) income
d ☐ Certain income re-sourced by treaty
e ☐ Lump-sum distributions

f Resident of (name of country) ▶

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
	A	B	C		(Add cols. A, B, and C.)
g **Enter the name of the foreign country or U.S. possession** ▶	OTHER COUNTRIES				
1a Gross income from sources within country shown above and of the type checked above (see instructions):	3,738.			1a	3,738.
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) ▶ ☐					
Deductions and losses (*Caution: See instructions*):					
2 Expenses **definitely related** to the income on line 1a (attach statement)	3.				
3 Pro rata share of other deductions **not definitely related:**					
a Certain itemized deductions or standard deduction (see instructions)	NONE				
b Other deductions (attach statement)					
c Add lines 3a and 3b	NONE				
d Gross foreign source income (see instructions)	4,159.				
e Gross income from all sources (see instructions)	626,836.				
f Divide line 3d by line 3e (see instructions)	0.00663491				
g Multiply line 3c by line 3f	NONE				
4 Pro rata share of interest expense (see instructions):					
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	3.			6	3.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				7	3,735.

Part II Foreign Taxes Paid or Accrued (see instructions)

Country	Credit is claimed for taxes (you must check one) (h) ☒ Paid (i) ☐ Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(n) Other foreign taxes paid or accrued	Taxes withheld at source on:			(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
	(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest		(o) Dividends	(p) Rents and royalties	(q) Interest		
A	1099 TAX					69.			477.	546.
B										
C										

8 **Add lines A through C, column (s). Enter the total here and on line 9, page 2** ▶ 8 546.

For Paperwork Reduction Act Notice, see instructions. Form **1116** (2014)

JSA
4X1410 2.000

ALTERNATIVE MINIMUM TAX

Form 1116 (2014) LAURA ANNE STUZIN & DANIEL J BERNSTEIN

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	546.		
10	Carryback or carryover (attach detailed computation) STMT 37	10	205.		
11	Add lines 9 and 10	11	751.		
12	Reduction in foreign taxes (see instructions)	12	( )		
13	Taxes reclassified under high tax kickout (see instructions)	13			
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit			14	751.
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 (see instructions)	15	3,735.		
16	Adjustments to line 15 (see instructions)	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	3,735.		
18	**Individuals:** Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. **Estates and trusts:** Enter your taxable income without the deduction for your exemption SEE STATEMENT 38 **Caution:** *If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.*	18	350,425.		
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"			19	0.01065849
20	**Individuals:** Enter the amounts from Form 1040, lines 44 and 46. If you are a nonresident alien, enter the amounts from Form 1040NR, 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 36 and 37 **Caution:** *If you are completing line 20 for separate category* **e** *(lump-sum distributions), see instructions.*			20	89,482.
21	Multiply line 20 by line 19 (maximum amount of credit)			21	954.
22	Enter the **smaller** of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV (see instructions) ▶			22	751.

Part IV Summary of Credits From Separate Parts III (see instructions)

23	Credit for taxes on passive category income	23			
24	Credit for taxes on general category income	24			
25	Credit for taxes on certain income re-sourced by treaty	25			
26	Credit for taxes on lump-sum distributions	26			
27	Add lines 23 through 26			27	
28	Enter the **smaller** of line 20 or line 27			28	751.
29	Reduction of credit for international boycott operations. See instructions for line 12			29	
30	Subtract line 29 from line 28. This is your **foreign tax credit.** Enter here and on Form 1040, line 48; Form 1040NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a ▶			30	751.

Form **4797**

Department of the Treasury
Internal Revenue Service

Sales of Business Property

(Also Involuntary Conversions and Recapture Amounts
Under Sections 179 and 280F(b)(2))

▶ Attach to your tax return.
▶ Information about Form 4797 and its separate instructions is at *www.irs.gov/form4797*.

OMB No. 1545-0184
2014
Attachment Sequence No. 27

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Identifying number:

1	Enter the gross proceeds from sales or exchanges reported to you for 2014 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20 (see instructions)	1	

Part I **Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft - Most Property Held More Than 1 Year** (see instructions)

2 (a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
SEE STATEMENT 40						69,194.

3	Gain, if any, from Form 4684, line 39	3	
4	Section 1231 gain from installment sales from Form 6252, line 26 or 37	4	
5	Section 1231 gain or (loss) from like-kind exchanges from Form 8824	5	
6	Gain, if any, from line 32, from other than casualty or theft	6	
7	Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows:	7	69,194.
	Partnerships (except electing large partnerships) and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.		
	Individuals, partners, S corporation shareholders, and all others. If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you did not have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.		
8	Nonrecaptured net section 1231 losses from prior years (see instructions)	8	92,422.
9	Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return (see instructions)	9	NONE

Part II **Ordinary Gains and Losses** (see instructions)

10 Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

11	Loss, if any, from line 7	11	( )
12	Gain, if any, from line 7 or amount from line 8, if applicable	12	69,194.
13	Gain, if any, from line 31	13	
14	Net gain or (loss) from Form 4684, lines 31 and 38a	14	
15	Ordinary gain from installment sales from Form 6252, line 25 or 36	15	
16	Ordinary gain or (loss) from like-kind exchanges from Form 8824	16	
17	Combine lines 10 through 16	17	69,194.
18	For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below:		
a	If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the part of the loss from income-producing property on Schedule A (Form 1040), line 28, and the part of the loss from property used as an employee on Schedule A (Form 1040), line 23. Identify as from "Form 4797, line 18a." See instructions	18a	
b	Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Form 1040, line 14	18b	69,194.

For Paperwork Reduction Act Notice, see separate instructions.

JSA
4X2610 2.000

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property:	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)
A		
B		
C		
D		

These columns relate to the properties on lines 19A through 19D. ▶		Property A	Property B	Property C	Property D
20 Gross sales price (**Note:** *See line 1 before completing.*)	20				
21 Cost or other basis plus expense of sale	21				
22 Depreciation (or depletion) allowed or allowable	22				
23 Adjusted basis. Subtract line 22 from line 21	23				
24 Total gain. Subtract line 23 from line 20	24				
25 **If section 1245 property:**					
a Depreciation allowed or allowable from line 22	25a				
b Enter the **smaller** of line 24 or 25a	25b				
26 **If section 1250 property:** If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291.					
a Additional depreciation after 1975 (see instructions)	26a				
b Applicable percentage multiplied by the **smaller** of line 24 or line 26a (see instructions)	26b				
c Subtract line 26a from line 24. If residential rental property or line 24 is not more than line 26a, skip lines 26d and 26e	26c				
d Additional depreciation after 1969 and before 1976	26d				
e Enter the **smaller** of line 26c or 26d	26e				
f Section 291 amount (corporations only)	26f				
g Add lines 26b, 26e, and 26f	26g				
27 **If section 1252 property:** Skip this section if you did not dispose of farmland or if this form is being completed for a partnership (other than an electing large partnership).					
a Soil, water, and land clearing expenses	27a				
b Line 27a multiplied by applicable percentage (see instructions)	27b				
c Enter the **smaller** of line 24 or 27b	27c				
28 **If section 1254 property:**					
a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion (see instructions)	28a				
b Enter the **smaller** of line 24 or 28a	28b				
29 **If section 1255 property:**					
a Applicable percentage of payments excluded from income under section 126 (see instructions)	29a				
b Enter the **smaller** of line 24 or 29a (see instructions)	29b				

Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

30 Total gains for all properties. Add property columns A through D, line 24	30	
31 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13	31	
32 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6	32	

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

		(a) Section 179	(b) Section 280F(b)(2)
33 Section 179 expense deduction or depreciation allowable in prior years	33		
34 Recomputed depreciation (see instructions)	34		
35 Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35		

Form **4797**

Department of the Treasury
Internal Revenue Service

Sales of Business Property

(Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2))

▶ Attach to your tax return.

▶ Information about Form 4797 and its separate instructions is at *www.irs.gov/form4797*.

OMB No. 1545-0184

2014

Attachment Sequence No. 27

Name(s) shown on return ALTERNATIVE MINIMUM TAX
LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Identifying number

1	Enter the gross proceeds from sales or exchanges reported to you for 2014 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20 (see instructions)	1	

Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft - Most Property Held More Than 1 Year (see instructions)

2 (a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
SEE STATEMENT 41						69,195.

3	Gain, if any, from Form 4684, line 39	3	
4	Section 1231 gain from installment sales from Form 6252, line 26 or 37	4	
5	Section 1231 gain or (loss) from like-kind exchanges from Form 8824	5	
6	Gain, if any, from line 32, from other than casualty or theft	6	
7	Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows:	7	69,195.

Partnerships (except electing large partnerships) and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.

Individuals, partners, S corporation shareholders, and all others. If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you did not have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.

8	Nonrecaptured net section 1231 losses from prior years (see instructions)	8	92,423.
9	Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return (see instructions)	9	NONE

Part II Ordinary Gains and Losses (see instructions)

10 Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

11	Loss, if any, from line 7	11	( )
12	Gain, if any, from line 7 or amount from line 8, if applicable	12	69,195.
13	Gain, if any, from line 31	13	
14	Net gain or (loss) from Form 4684, lines 31 and 38a	14	
15	Ordinary gain from installment sales from Form 6252, line 25 or 36	15	
16	Ordinary gain or (loss) from like-kind exchanges from Form 8824	16	
17	Combine lines 10 through 16	17	69,195.
18	For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below:		
a	If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the part of the loss from income-producing property on Schedule A (Form 1040), line 28, and the part of the loss from property used as an employee on Schedule A (Form 1040), line 23. Identify as from "Form 4797, line 18a." See instructions	18a	
b	Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Form 1040, line 14	18b	69,195.

For Paperwork Reduction Act Notice, see separate instructions.

Form **4797** (2014)

Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

19	(a) Description of section 1245, 1250, 1252, 1254, or 1255 property:	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)
A			
B			
C			
D			

These columns relate to the properties on lines 19A through 19D. ▶		Property A	Property B	Property C	Property D
20 Gross sales price (**Note:** *See line 1 before completing.*)	20				
21 Cost or other basis plus expense of sale	21				
22 Depreciation (or depletion) allowed or allowable . . .	22				
23 Adjusted basis. Subtract line 22 from line 21	23				
24 Total gain. Subtract line 23 from line 20	24				
25 **If section 1245 property:**					
a Depreciation allowed or allowable from line 22 . . .	25a				
b Enter the **smaller** of line 24 or 25a	25b				
26 **If section 1250 property:** If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291.					
a Additional depreciation after 1975 (see instructions) .	26a				
b Applicable percentage multiplied by the **smaller** of line 24 or line 26a (see instructions)	26b				
c Subtract line 26a from line 24. If residential rental property or line 24 is not more than line 26a, skip lines 26d and 26e .	26c				
d Additional depreciation after 1969 and before 1976 .	26d				
e Enter the **smaller** of line 26c or 26d	26e				
f Section 291 amount (corporations only)	26f				
g Add lines 26b, 26e, and 26f	26g				
27 **If section 1252 property:** Skip this section if you did not dispose of farmland or if this form is being completed for a partnership (other than an electing large partnership).					
a Soil, water, and land clearing expenses	27a				
b Line 27a multiplied by applicable percentage (see instructions) .	27b				
c Enter the **smaller** of line 24 or 27b	27c				
28 **If section 1254 property:**					
a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion (see instructions) .	28a				
b Enter the **smaller** of line 24 or 28a	28b				
29 **If section 1255 property:**					
a Applicable percentage of payments excluded from income under section 126 (see instructions)	29a				
b Enter the **smaller** of line 24 or 29a (see instructions) .	29b				

Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

30	Total gains for all properties. Add property columns A through D, line 24	30	
31	Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13	31	
32	Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6	32	

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

			(a) Section 179	(b) Section 280F(b)(2)
33	Section 179 expense deduction or depreciation allowable in prior years	33		
34	Recomputed depreciation (see instructions)	34		
35	Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35		

Form **6251**

Department of the Treasury
Internal Revenue Service (99)

Alternative Minimum Tax - Individuals

▶ Information about Form 6251 and its separate instructions is at *www.irs.gov/form6251*.
▶ Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074
2014
Attachment Sequence No. 32

Name(s) shown on Form 1040 or Form 1040NR: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Your social security number: [redacted]

Part I Alternative Minimum Taxable Income (See instructions for how to complete each line.)

1	If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41, and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.)	1	386,541.
2	Medical and dental. If you or your spouse was 65 or older, enter the **smaller** of Schedule A (Form 1040), line 4, **or** 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3	Taxes from Schedule A (Form 1040), line 9	3	18,041.
4	Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	
5	Miscellaneous deductions from Schedule A (Form 1040), line 27	5	11,353.
6	If Form 1040, line 38, is $152,525 or less, enter -0-. Otherwise, see instructions	6	(3,674.)
7	Tax refund from Form 1040, line 10 or line 21	7	( )
8	Investment interest expense (difference between regular tax and AMT)	8	
9	Depletion (difference between regular tax and AMT)	9	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11	Alternative tax net operating loss deduction	11	( )
12	Interest from specified private activity bonds exempt from the regular tax	12	177.
13	Qualified small business stock (7% of gain excluded under section 1202)	13	
14	Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17	Disposition of property (difference between AMT and regular tax gain or loss) STMT. 42	17	1.
18	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	NONE
19	Passive activities (difference between AMT and regular tax income or loss) STMT. 42	19	1,204.
20	Loss limitations (difference between AMT and regular tax income or loss)	20	
21	Circulation costs (difference between regular tax and AMT)	21	
22	Long-term contracts (difference between AMT and regular tax income)	22	
23	Mining costs (difference between regular tax and AMT)	23	
24	Research and experimental costs (difference between regular tax and AMT)	24	
25	Income from certain installment sales before January 1, 1987	25	( )
26	Intangible drilling costs preference	26	
27	Other adjustments, including income-based related adjustments	27	
28	**Alternative minimum taxable income.** Combine lines 1 through 27. (If married filing separately and line 28 is more than $242,450, see instructions.)	28	413,643.

Part II Alternative Minimum Tax (AMT)

29 Exemption. (If you were under age 24 at the end of 2014, see instructions.) STMT 51

IF your filing status is . . .	AND line 28 is not over . . .	THEN enter on line 29 . . .
Single or head of household	$117,300	$52,800
Married filing jointly or qualifying widow(er)	156,500	82,100
Married filing separately	78,250	41,050

If line 28 is **over** the amount shown above for your filing status, see instructions. **29** 17,814.

30	Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33, and 35, and go to line 34	30	395,829.
31	• If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; **or** you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 64 here. • **All others:** If line 30 is $182,500 or less ($91,250 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract $3,650 ($1,825 if married filing separately) from the result.	31	89,482.
32	Alternative minimum tax foreign tax credit (see instructions)	32	751.
33	Tentative minimum tax. Subtract line 32 from line 31	33	88,731.
34	Add Form 1040, line 44 (minus any tax from Form 4972), and Form 1040, line 46. Subtract from the result any foreign tax credit from Form 1040, line 48. If you used Schedule J to figure your tax on Form 1040, line 44, refigure that tax without using Schedule J before completing this line (see instructions)	34	77,996.
35	**AMT.** Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	35	10,735.

For Paperwork Reduction Act Notice, see your tax return instructions. Form **6251** (2014)

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Part III Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax Worksheet in the instructions.

36	Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions for line 31	36	395,829.
37	Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, 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 or 2555-EZ, see instructions for the amount to enter	37	136,158.
38	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 or 2555-EZ, see instructions for the amount to enter	38	
39	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the **smaller** 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 or 2555-EZ, see instructions for the amount to enter	39	136,158.
40	Enter the **smaller** of line 36 or line 39	40	136,158.
41	Subtract line 40 from line 36	41	259,671.
42	If line 41 is $182,500 or less ($91,250 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract $3,650 ($1,825 if married filing separately) from the result STMT. 52 ▶	42	69,058.
43	Enter: • $73,800 if married filing jointly or qualifying widow(er), • $36,900 if single or married filing separately, or • $49,400 if head of household.	43	73,800.
44	Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), 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, line 43; if zero or less, enter -0-. If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	44	250,067.
45	Subtract line 44 from line 43. If zero or less, enter -0-	45	
46	Enter the **smaller** of line 36 or line 37	46	136,158.
47	Enter the **smaller** of line 45 or line 46. This amount is taxed at 0%	47	
48	Subtract line 47 from line 46	48	136,158.
49	Enter: • $406,750 if single • $228,800 if married filing separately • $457,600 if married filing jointly or qualifying widow(er) • $432,200 if head of household	49	457,600.
50	Enter the amount from line 45	50	
51	Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 19 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, line 43; if zero or less, enter -0-. If you are filing Form 2555 or Form 2555-EZ, see instructions for the amount to enter	51	250,067.
52	Add line 50 and line 51	52	250,067.
53	Subtract line 52 from line 49. If zero or less, enter -0-	53	207,533.
54	Enter the smaller of line 48 or line 53	54	136,158.
55	Multiply line 54 by 15% (.15) ▶	55	20,424.
56	Add lines 47 and 54	56	136,158.
	If lines 56 and 36 are the same, skip lines 57 through 61 and go to line 62. Otherwise, go to line 57.		
57	Subtract line 56 from line 46	57	
58	Multiply line 57 by 20% (.20) ▶	58	
	If line 38 is zero or blank, skip lines 59 through 61 and go to line 62. Otherwise, go to line 59.		
59	Add lines 41, 56, and 57	59	
60	Subtract line 59 from line 36	60	
61	Multiply line 60 by 25% (.25) ▶	61	
62	Add lines 42, 55, 58, and 61	62	89,482.
63	If line 36 is $182,500 or less ($91,250 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract $3,650 ($1,825 if married filing separately) from the result	63	STMT 52 107,182.
64	Enter the **smaller** of line 62 or line 63 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for line 31	64	89,482.

SCHEDULE H (Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Household Employment Taxes

(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)

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

▶ Information about Schedule H and its separate instructions is at *www.irs.gov/scheduleh.*

OMB No. 1545-1971

2014

Attachment Sequence No. **44**

Name of employer: LAURA ANNE STUZIN

Social security number:

Employer identification number: [redacted]

Calendar year taxpayers having no household employees in 2014 do not have to complete this form for 2014.

A Did you pay **any one** household employee cash wages of $1,900 or more in 2014? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions before you answer this question.)

☒ **Yes.** Skip lines B and C and go to line 1.
☐ **No.** Go to line B.

B Did you withhold federal income tax during 2014 for any household employee?

☐ **Yes.** Skip line C and go to line 7.
☐ **No.** Go to line C.

C Did you pay **total** cash wages of $1,000 or more in **any** calendar **quarter** of 2013 or 2014 to **all** household employees? (**Do not** count cash wages paid in 2013 or 2014 to your spouse, your child under age 21, or your parent.)

☐ **No. Stop.** Do not file this schedule.
☐ **Yes.** Skip lines 1-9 and go to line 10.

Part I Social Security, Medicare, and Federal Income Taxes

1	Total cash wages subject to social security tax	1	32,332.		STMT 53
2	Social security tax. Multiply line 1 by 12.4% (.124)			2	4,009.
3	Total cash wages subject to Medicare tax	3	32,332.		
4	Medicare tax. Multiply line 3 by 2.9% (.029)			4	938.
5	Total cash wages subject to Additional Medicare Tax withholding	5			
6	Additional Medicare Tax withholding. Multiply line 5 by 0.9% (.009)			6	
7	Federal income tax withheld, if any			7	2,424.
8	**Total social security, Medicare, and federal income taxes.** Add lines 2, 4, 6, and 7			8	7,371.

9 Did you pay **total** cash wages of $1,000 or more in **any** calendar **quarter** of 2013 or 2014 to **all** household employees? (**Do not** count cash wages paid in 2013 or 2014 to your spouse, your child under age 21, or your parent.)

☐ **No. Stop.** Include the amount from line 8 above on Form 1040, line 60a. If you are not required to file Form 1040, see the line 9 instructions.

☒ **Yes.** Go to line 10.

For Privacy Act and Paperwork Reduction Act Notice, see the instructions. **Schedule H (Form 1040) 2014**

JSA
4X3023 2.000

Part II Federal Unemployment (FUTA) Tax

			Yes	No
10	Did you pay unemployment contributions to only one state? (If you paid contributions to a credit reduction state, see instructions and check "No.")	10	X	
11	Did you pay all state unemployment contributions for 2014 by April 15, 2015? Fiscal year filers see instructions	11	X	
12	Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?	12	X	

Next: If you checked the **"Yes"** box on **all** the lines above, complete Section A.
If you checked the **"No"** box on **any** of the lines above, skip Section A and complete Section B.

Section A

13	Name of the state where you paid unemployment contributions ▶ FL				
14	Contributions paid to your state unemployment fund	14	142.		
15	Total cash wages subject to FUTA tax			15	23,868.
16	**FUTA tax.** Multiply line 15 by .6% (.006). Enter the result here, skip Section B, and go to line 25			16	143.

Section B

17 Complete all columns below that apply (if you need more space, see instructions):

(a) Name of state	(b) Taxable wages (as defined in state act)	(c) State experience rate period		(d) State experience rate	(e) Multiply col. (b) by .054	(f) Multiply col. (b) by col. (d)	(g) Subtract col. (f) from col. (e). If zero or less, enter -0-.	(h) Contributions paid to state unemployment fund
		From	To					

18	Totals			18	
19	Add columns (g) and (h) of line 18	19			
20	Total cash wages subject to FUTA tax (see the line 15 instructions)			20	
21	Multiply line 20 by 6.0% (.060)			21	
22	Multiply line 20 by 5.4% (.054)	22			
23	Enter the **smaller** of line 19 or line 22 (Employers in a credit reduction state must use the worksheet on page H-7 and check here) ☐			23	
24	**FUTA tax.** Subtract line 23 from line 21. Enter the result here and go to line 25			24	

Part III Total Household Employment Taxes

25	Enter the amount from line 8. If you checked the "Yes" box on line C of page 1, enter -0-	25	7,371.
26	Add line 16 (or line 24) and line 25	26	7,514.

27 Are you required to file Form 1040?

☒ **Yes. Stop.** Include the amount from line 26 above on Form 1040, line 60a. **Do not** complete Part IV below.

☐ **No.** You may have to complete Part IV. See instructions for details.

Part IV Address and Signature - Complete this part **only** if required. See the line 27 instructions.

Address (number and street) or P.O. box if mail is not delivered to street address

Apt., room, or suite no.

City, town or post office, state, and ZIP code

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

▶ Employer's signature ▶ Date

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no.	

Form **8606**

Department of the Treasury
Internal Revenue Service (99)

Nondeductible IRAs

▶ Information about Form 8606 and its separate instructions is at *www.irs.gov/form8606.*

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

OMB No. 1545-0074

2014

Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file Form 8606. See instructions.
LAURA ANNE STUZIN

Your social security number

Fill in Your Address Only If You Are Filing This Form by Itself and Not With Your Tax Return ▶

Home address (number and street, or P.O. box if mail is not delivered to your home)

Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below.

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

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2014.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2014 **and** you made nondeductible contributions to a traditional IRA in 2014 or an earlier year. For this purpose, a distribution does not include a rollover, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2014 (excluding any portion you recharacterized) **and** you made nondeductible contributions to a traditional IRA in 2014 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2014, including those made for 2014 from January 1, 2015, through April 15, 2015 (see instructions)			1	
2	Enter your total basis in traditional IRAs (see instructions)			2	5,000.
3	Add lines 1 and 2			3	5,000.
	In 2014, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion? — No ▶ Enter the amount from line 3 on line 14. Do not complete the rest of Part I. — Yes ▶ Go to line 4.				
4	Enter those contributions included on line 1 that were made from January 1, 2015, through April 15, 2015			4	
5	Subtract line 4 from line 3			5	
6	Enter the value of **all** your traditional, SEP, and SIMPLE IRAs as of December 31, 2014, plus any outstanding rollovers (see instructions)	6			
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2014. **Do not** include rollovers, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7			
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2014. **Do not** include amounts converted that you later recharacterized (see instructions). Also enter this amount on line 16	8			
9	Add lines 6, 7, and 8 — 9				
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	x		
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also enter this amount on line 17	11			
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12			
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions			13	
14	Subtract line 13 from line 3. This is **your total basis in traditional IRAs for 2014 and earlier years**			14	5,000.
15	**Taxable amount.** Subtract line 12 from line 7. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b			15	

Note. You may be subject to an additional 10% tax on the amount on line 15 if you were under age 59 1/2 at the time of the distribution (see instructions).

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

Form **8606** (2014)

JSA
4A6900 2.000

Part II 2014 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2014 (excluding any portion you recharacterized).

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2014. **Do not** include amounts you later recharacterized back to traditional, SEP, or SIMPLE IRAs in 2014 or 2015 (see instructions)	16	
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	
18	**Taxable amount.** Subtract line 17 from line 16. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	18	

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2014. For this purpose, a distribution does not include a rollover, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2014, including any qualified first-time homebuyer distributions (see instructions)	19	
20	Qualified first-time homebuyer expenses (see instructions). **Do not** enter more than $10,000	20	
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	
22	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, **stop here**	22	
23	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions)	23	
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA (see instructions)	24	
25	**Taxable amount.** Subtract line 24 from line 23. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	25	

Sign Here Only If You Are Filing This Form by Itself and Not With Your Tax Return

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

▶ Your signature ▶ Date

Paid Preparer Use Only				
Print/Type preparer's name MICHAEL H NOVAK	Preparer's signature	Date	Check ☐ if self-employed	PTIN P01074800
Firm's name ▶ MARCUM, LLP			Firm's EIN [redacted]	
Firm's address ▶ONE SE THIRD AVENUE, SUITE MIAMI FL 33131			Phone no. 305-995-9600	

Form **8606** (2014)

Form **8606**

Department of the Treasury
Internal Revenue Service (99)

Nondeductible IRAs

▶ Information about Form 8606 and its separate instructions is at *www.irs.gov/form8606.*

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

OMB No. 1545-0074

2014

Attachment
Sequence No. **48**

Name. If married, file a separate form for each spouse required to file Form 8606. See instructions.
DANIEL J BERNSTEIN

Your social security number
[redacted]

Fill in Your Address Only If You Are Filing This Form by Itself and Not With Your Tax Return ▶

Home address (number and street, or P.O. box if mail is not delivered to your home)

Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below.

Foreign country name

Foreign province/state/county

Foreign postal code

Part I Nondeductible Contributions to Traditional IRAs and Distributions From Traditional, SEP, and SIMPLE IRAs

Complete this part only if one or more of the following apply.

- You made nondeductible contributions to a traditional IRA for 2014.
- You took distributions from a traditional, SEP, or SIMPLE IRA in 2014 **and** you made nondeductible contributions to a traditional IRA in 2014 or an earlier year. For this purpose, a distribution does not include a rollover, one-time distribution to fund an HSA, conversion, recharacterization, or return of certain contributions.
- You converted part, but not all, of your traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2014 (excluding any portion you recharacterized) **and** you made nondeductible contributions to a traditional IRA in 2014 or an earlier year.

1	Enter your nondeductible contributions to traditional IRAs for 2014, including those made for 2014 from January 1, 2015, through April 15, 2015 (see instructions)			1	
2	Enter your total basis in traditional IRAs (see instructions)			2	3,500.
3	Add lines 1 and 2			3	3,500.

In 2014, did you take a distribution from traditional, SEP, or SIMPLE IRAs, or make a Roth IRA conversion?

No ▶ Enter the amount from line 3 on line 14. Do not complete the rest of Part I.

Yes ▶ Go to line 4.

4	Enter those contributions included on line 1 that were made from January 1, 2015, through April 15, 2015			4	
5	Subtract line 4 from line 3			5	
6	Enter the value of **all** your traditional, SEP, and SIMPLE IRAs as of December 31, 2014, plus any outstanding rollovers (see instructions) . . .	6			
7	Enter your distributions from traditional, SEP, and SIMPLE IRAs in 2014. **Do not** include rollovers, a one-time distribution to fund an HSA, conversions to a Roth IRA, certain returned contributions, or recharacterizations of traditional IRA contributions (see instructions)	7			
8	Enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2014. **Do not** include amounts converted that you later recharacterized (see instructions). Also enter this amount on line 16 .	8			
9	Add lines 6, 7, and 8 9				
10	Divide line 5 by line 9. Enter the result as a decimal rounded to at least 3 places. If the result is 1.000 or more, enter "1.000"	10	x		
11	Multiply line 8 by line 10. This is the nontaxable portion of the amount you converted to Roth IRAs. Also enter this amount on line 17	11			
12	Multiply line 7 by line 10. This is the nontaxable portion of your distributions that you did not convert to a Roth IRA	12			
13	Add lines 11 and 12. This is the nontaxable portion of all your distributions			13	
14	Subtract line 13 from line 3. This is **your total basis in traditional IRAs for 2014 and earlier years**			14	3,500.
15	**Taxable amount.** Subtract line 12 from line 7. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b			15	

Note. You may be subject to an additional 10% tax on the amount on line 15 if you were under age 59 1/2 at the time of the distribution (see instructions).

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

Form **8606** (2014)

Part II 2014 Conversions From Traditional, SEP, or SIMPLE IRAs to Roth IRAs

Complete this part if you converted part or all of your traditional, SEP, and SIMPLE IRAs to a Roth IRA in 2014 (excluding any portion you recharacterized).

16	If you completed Part I, enter the amount from line 8. Otherwise, enter the net amount you converted from traditional, SEP, and SIMPLE IRAs to Roth IRAs in 2014. **Do not** include amounts you later recharacterized back to traditional, SEP, or SIMPLE IRAs in 2014 or 2015 (see instructions)	16	
17	If you completed Part I, enter the amount from line 11. Otherwise, enter your basis in the amount on line 16 (see instructions)	17	
18	**Taxable amount.** Subtract line 17 from line 16. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	18	

Part III Distributions From Roth IRAs

Complete this part only if you took a distribution from a Roth IRA in 2014. For this purpose, a distribution does not include a rollover, one-time distribution to fund an HSA, recharacterization, or return of certain contributions (see instructions).

19	Enter your total nonqualified distributions from Roth IRAs in 2014, including any qualified first-time homebuyer distributions (see instructions)	19	
20	Qualified first-time homebuyer expenses (see instructions). **Do not** enter more than $10,000	20	
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	
22	Enter your basis in Roth IRA contributions (see instructions). If line 21 is zero, **stop here**	22	
23	Subtract line 22 from line 21. If zero or less, enter -0- and skip lines 24 and 25. If more than zero, you may be subject to an additional tax (see instructions)	23	
24	Enter your basis in conversions from traditional, SEP, and SIMPLE IRAs and rollovers from qualified retirement plans to a Roth IRA (see instructions)	24	
25	**Taxable amount.** Subtract line 24 from line 23. If more than zero, also include this amount on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b	25	

Sign Here Only If You Are Filing This Form by Itself and Not With Your Tax Return

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

▶ Your signature ▶ Date

Paid Preparer Use Only

Print/Type preparer's name MICHAEL H NOVAK	Preparer's signature	Date	Check ☐ if self-employed	PTIN P01074800
Firm's name ▶ MARCUM, LLP			Firm's EIN ▶ [redacted]	
Firm's address ▶ ONE SE THIRD AVENUE, SUITE MIAMI FL 33131			Phone no. 305-995-9600	

Form **8606** (2014)

Form **4952**

Department of the Treasury
Internal Revenue Service (99)

Investment Interest Expense Deduction

▶ Information about Form 4952 and its instructions is at *www.irs.gov/form4952.*

▶ Attach to your tax return.

OMB No. 1545-0191

2014

Attachment
Sequence No. 51

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Identifying number:

Part I Total Investment Interest Expense

1	Investment interest expense paid or accrued in 2014 (see instructions) SEE STATEMENT 54			1	12,686.
2	Disallowed investment interest expense from 2013 Form 4952, line 7			2	
3	**Total investment interest expense.** Add lines 1 and 2			3	12,686.

Part II Net Investment Income

4a	Gross income from property held for investment (excluding any net gain from the disposition of property held for investment)	4a	118,559.		
b	Qualified dividends included on line 4a	4b	75,715.		
c	Subtract line 4b from line 4a			4c	42,844.
d	Net gain from the disposition of property held for investment	4d	60,443.		
e	Enter the **smaller** of line 4d or your net capital gain from the disposition of property held for investment (see instructions)	4e	60,443.		
f	Subtract line 4e from line 4d			4f	
g	Enter the amount from lines 4b and 4e that you elect to include in investment income (see instructions) SEE STATEMENT 55			4g	NONE
h	Investment income. Add lines 4c, 4f, and 4g			4h	42,844.
5	Investment expenses (see instructions)			5	11,353.
6	**Net investment income.** Subtract line 5 from line 4h. If zero or less, enter -0- SEE STMT 57			6	31,491.

Part III Investment Interest Expense Deduction

7	Disallowed investment interest expense to be carried forward to 2015. Subtract line 6 from line 3. If zero or less, enter -0-	7	NONE
8	**Investment interest expense deduction.** Enter the **smaller** of line 3 or 6. See instructions	8	12,686.

Form **8959**

Department of the Treasury
Internal Revenue Service

Additional Medicare Tax

▶ If any line does not apply to you, leave it blank. See separate instructions.
▶ Attach to Form 1040, 1040NR, 1040-PR, or 1040-SS.
▶ Information about Form 8959 and its instructions is at *www.irs.gov/form8959.*

OMB No. 1545-0074
2014
Attachment
Sequence No. **71**

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Your social security number:

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	249,489.		
2	Unreported tips from Form 4137, line 6	2			
3	Wages from Form 8919, line 6	3			
4	Add lines 1 through 3	4	249,489.		
5	Enter the following amount for your filling status: Married filing jointly $250,000 Married filing separately $125,000 Single, Head of household, or Qualifying widow(er) $200,000	5	250,000.		
6	Subtract line 5 from line 4. If zero or less, enter -0-			6	NONE
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (.009). Enter here and go to Part II			7	NONE

Part II Additional Medicare Tax on Self-Employment Income

8	Self-employment income from Schedule SE (Form 1040), Section A, line 4, or Section B, line 6. If you had a loss, enter -0- (Form 1040-PR and Form 1040-SS filers, see instructions.)	8	7,388.		
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	9	250,000.		
10	Enter the amount from line 4	10	249,489.		
11	Subtract line 10 from line 9. If zero or less, enter -0-	11	511.		
12	Subtract line 11 from line 8. If zero or less, enter -0-			12	6,877.
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (.009). Enter here and go to Part III			13	62.

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

14	Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14			
15	Enter the following amount for your filing status: Married filing jointly $250,000 Married filing separately $125,000 Single, Head of household, or Qualifying widow(er) $200,000	15			
16	Subtract line 15 from line 14. If zero or less, enter -0-			16	
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (.009). Enter here and go to Part IV			17	

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Form 1040, line 62, (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions) and go to Part V			18	62.

Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	3,617.		
20	Enter the amount from line 1	20	249,489.		
21	Multiply line 20 by 1.45% (.0145). This is your regular Medicare tax withholding on Medicare wages	21	3,618.		
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages			22	NONE
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)			23	
24	**Total Additional Medicare Tax withholding.** Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, line 64 (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions)			24	NONE

JSA 4A1255 2.000 **For Paperwork Reduction Act Notice, see your tax return instructions.**

Form **8960**

Department of the Treasury
Internal Revenue Service (99)

Net Investment Income Tax- Individuals, Estates, and Trusts

▶ Attach to your tax return.
▶ Information about Form 8960 and its separate instructions is at *www.irs.gov/form8960.*

OMB No. 1545-2227
2014
Attachment Sequence No. 72

Name(s) shown on your tax return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Your social security number or EIN: [redacted]

Part I Investment Income

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

1	Taxable interest (see instructions)			1	10,826.
2	Ordinary dividends (see instructions)			2	107,706.
3	Annuities (see instructions)			3	
4 a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a	-59,476.		
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b			
c	Combine lines 4a and 4b			4c	-59,476.
5 a	Net gain or loss from disposition of property (see instructions)	5a	129,637.		
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b			
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c			
d	Combine lines 5a through 5c			5d	129,637.
6	Adjustments to investment income for certain CFCs and PFICs (see instructions)			6	
7	Other modifications to investment income (see instructions)			7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7			8	188,693.

Part II Investment Expenses Allocable to Investment Income and Modifications

9 a	Investment interest expenses (see instructions) STMT 58	9a	12,686.		
b	State, local, and foreign income tax (see instructions)	9b			
c	Miscellaneous investment expenses (see instructions) STMT 59	9c	11,353.		
d	Add lines 9a, 9b, and 9c			9d	24,039.
10	Additional modifications (see instructions)			10	
11	Total deductions and modifications. Add lines 9d and 10			11	24,039.

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11 from Part I, line 8. Individuals complete lines 13-17. Estates and trusts complete lines 18a-21. If zero or less, enter -0-			12	164,654.
	Individuals:				
13	Modified adjusted gross income (see instructions) STMT 60	13	427,509.		
14	Threshold based on filing status (see instructions)	14	250,000.		
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	177,509.		
16	Enter the smaller of line 12 or line 15			16	164,654.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). **Enter here and include on your tax return** (see instructions)			17	6,257.
	Estates and Trusts:				
18 a	Net investment income (line 12 above)	18a			
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b			
c	Undistributed net investment income. Subtract line 18b from 18a (see instructions). If zero or less, enter -0-	18c			
19 a	Adjusted gross income (see instructions)	19a			
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b			
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c			
20	Enter the smaller of line 18c or line 19c			20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (.038). **Enter here and include on your tax return** (see instructions)			21	

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

Form **8960** (2014)

JSA
4X2735 2.000

Lines 5a-5d - Net Gains and Losses Worksheet

Keep for Your Records

	(A) Capital gains/(losses) Form 1040, line13; Form 1041, line 4; Form 1041-QFT, line 3; Form 1040NR, statement reflecting US residency portion of Form 1040, line 13	(B) Ordinary gains/(losses) Form 1040, line 14; Form 1041, line 7; Form 1041-QFT, portion of line 4 attributed to ordinary gain/(loss); Form 1040NR, statement reflecting US residency portion of Form 1040, line 14	Total of columns (A)+(B)
1. Beginning net gains and losses	60,443.	69,194.	Enter this amount on line 5a 129,637.
2. **Gains and losses excluded from net investment income.** *Use current year amounts for lines 2a-2g and 2i.*			
(a) Enter net gains from the disposition of property used in a non-section 1411 trade or business (enter as negative amounts): Name of Trade or Business ______ Amount ( ) ______ ( ) ______ ( )	( )	( )	
(b) Enter net losses from the disposition of property used in a non-section 1411 trade or business (enter as positive amounts): Name of Trade or Business ______ Amount ______ ______ ______ ______ ______			
(c) Enter net losses from a former passive activity (FPA) allowed by reason of section 469(f)(1)(A)			
(d) Gains recognized in the current year for payments received on an installment sale obligation or private annuity for the disposition of property used in a non-section 1411 trade or business	( )		
(e) Enter the net gain attributable to the net unrealized appreciation (NUA) in employer securities	( )		
(f) In the case of a QEF (other than a QEF held in a section 1411 trade or business) for which a section 1.1411-10(g) election is not in effect, enter the amount treated as long-term capital gain for regular income tax purposes under section 1293(a)(1)(B)	( )		
(g) Enter any other gains and losses included in net investment income that are not otherwise reported on Form 8960 and any other gains and losses excluded from net investment income reported on line 5a (enter excluded gains as a negative number and excluded losses as a positive number)			
(h) Enter the amount reported on line 2(i) of this worksheet from your prior tax year return calculations. Enter as a positive number			
(i) If you do not have a capital loss carryover to next year, then skip this line and go to line 2(j). Otherwise, enter the lesser of (i)(1) or (i)(2) as a negative amount	( )		
(i)(1) If the sum of the amounts entered on lines 2(a)-2(h) and line 3(d), column (A), is greater than zero, enter that amount here. Otherwise, enter -0- on line 2(i) and go to line 2(j) . . . . ______ OR (i)(2) The amount of capital loss carried over to next year (Schedule D (Form 1040), line 16, less the amount allowed as a current deduction on Schedule D (Form 1040), line 21) entered as a positive number . . . . ______			
(j) **Sum of lines 2(a) through 2(i)**			Enter this amount on line 5b

Lines 5a-5d - Net Gains and Losses Worksheet-*continued*

Keep for Your Records

		(A) Capital gains/(losses) Form 1040, line 13; Form 1041, line 4; Form 1041-QFT, line 3; Form 1040NR, statement reflecting US residency portion of Form 1040, line 13	(B) Ordinary gains/ (losses) Form 1040, line 14; Form 1041, line 7; Form 1041-QFT, portion of line 4 attributed to ordinary gain/(loss); Form 1040NR, statement reflecting US residency portion of Form 1040, line 14	Total of columns (A)+(B)
3.	**Adjustment for gains and losses attributable to the disposition of interests in partnerships and S corporations**			
(a) Net Gains	(i) Enter the amount of net gain from the disposition of a partnership or S corporation included in line 5a to which section 1411(c)(4)(A) applies			
	(ii) Enter the amount of net gain included in net investment income after the application of Regulations section 1.1411-7. (The sum of columns A and B of line 3(a)(ii) must be less than, or equal to, the sum of columns A and B of line 3(a)(i).)			
	(iii) Enter the difference between line 3(a)(i) and line 3(a)(ii)			
(b) Net Losses	(i) Enter the amount of net loss from the disposition of a partnership or S corporation included in line 5a to which section 1411(c)(4)(B) applies			
	(ii) Enter the amount of net loss included in net investment income after the application of Regulations section 1.1411-7. (The sum of columns A and B of line 3(b)(ii) must be less than, or equal to, the sum of columns A and B of line 3(b)(i).)			
	(iii) Enter the difference between line 3(b)(i) and line 3(b)(ii)			
(c) Defferred Sales	(i) Enter the amount of gain recognized in the current year attributable payments received on an installment sale obligation or private annuity that was attributable to the disposition of an interest in a partnership or an S corporation in a year preceding the current year. Also report any gain or loss associated with section 736(b) payments on this line			
	(ii) Enter the amount of adjustment attributable to such gain			
	(iii) Subtract 3(c)(ii) from 3(c)(i)			
(d)	**Combine the amounts on lines 3(a)(iii), 3(b)(iii), and 3(c)(iii)**			**Enter this amount on line 5c**
4.	**Sum of items reported on lines 5a-5c**			
	Add lines 1, 2(j), and 3(d)	60,443.	69,194.	**Enter this amount on line 5d** 129,637.

TIP *If the amount of gain for NIIT purposes is less than the amount of gain for regular income tax purposes, the entry on lines 3(a)(iii), 3(b)(iii), or 3(c)(iii) should be a negative number.*

If the amount of loss for NIIT purposes is less than the amount of loss for regular income tax purposes, the entry on lines 3(a)(iii), 3(b)(iii), or 3(c)(iii) should be a positive number.

Form **8582**

Department of the Treasury
Internal Revenue Service (99)

Passive Activity Loss Limitations

▶ See separate instructions.
▶ Attach to Form 1040 or Form 1041.
▶ Information about Form 8582 and its instructions is available at *www.irs.gov/form8582.*

OMB No. 1545-1008
2014
Attachment Sequence No. **88**

Name(s) shown on return: LAURA ANNE STUZIN & DANIEL J BERNSTEIN

Identifying number:

Part I 2014 Passive Activity Loss

Caution: *Complete Worksheets 1, 2, and 3 before completing Part I.*

	Rental Real Estate Activities With Active Participation (For the definition of active participation, see **Special Allowance for Rental Real Estate Activities** in the instructions.)				
1a	Activities with net income (enter the amount from Worksheet 1, column (a))	1a			
b	Activities with net loss (enter the amount from Worksheet 1, column (b))	1b	( )		
c	Prior years unallowed losses (enter the amount from Worksheet 1, column (c))	1c	( )		
d	Combine lines 1a, 1b, and 1c			1d	
	Commercial Revitalization Deductions From Rental Real Estate Activities				
2a	Commercial revitalization deductions from Worksheet 2, column (a)	2a	( )		
b	Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)	2b	( )		
c	Add lines 2a and 2b			2c	( )
	All Other Passive Activities				
3a	Activities with net income (enter the amount from Worksheet 3, column (a))	3a	142,781.		
b	Activities with net loss (enter the amount from Worksheet 3, column (b))	3b	(22,475.)		
c	Prior years unallowed losses (enter the amount from Worksheet 3, column (c))	3c	(110,605.)		
d	Combine lines 3a, 3b, and 3c			3d	9,701.
4	Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used			4	9,701.

If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
- Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
- Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

Caution: *If your filing status is married filing separately and you lived with your spouse at any time during the year,* **do not** *complete Part II or Part III. Instead, go to line 15.*

Part II Special Allowance for Rental Real Estate Activities With Active Participation

Note: *Enter all numbers in Part II as positive amounts. See instructions for an example.*

5	Enter the **smaller** of the loss on line 1d or the loss on line 4			5	
6	Enter $150,000. If married filing separately, see instructions	6			
7	Enter modified adjusted gross income, but not less than zero (see instructions)	7			
	Note: *If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.*				
8	Subtract line 7 from line 6	8			
9	Multiply line 8 by 50% (.5). **Do not** enter more than $25,000. If married filing separately, see instructions			9	
10	Enter the **smaller** of line 5 or line 9			10	

If line 2c is a loss, go to Part III. Otherwise, go to line 15.

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: *Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions.*

11	Enter $25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	11	
12	Enter the loss from line 4	12	
13	Reduce line 12 by the amount on line 10	13	
14	Enter the **smallest** of line 2c (treated as a positive amount), line 11, or line 13	14	

Part IV Total Losses Allowed

15	Add the income, if any, on lines 1a and 3a and enter the total	15	142,781.
16	**Total losses allowed from all passive activities for 2014.** Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return	16	133,080.

For Paperwork Reduction Act Notice, see instructions.

Form **8582** (2014)

Caution: *The worksheets must be filed with your tax return. Keep a copy for your records.*

Worksheet 1 - For Form 8582, Lines 1a, 1b, and 1c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 1a, 1b, and 1c . . . . ▶					

Worksheet 2 - For Form 8582, Lines 2a and 2b (See instructions.)

Name of activity	(a) Current year deductions (line 2a)	(b) Prior year unallowed deductions (line 2b)	(c) Overall loss
Total. Enter on Form 8582, lines 2a and 2b . . . . ▶			

Worksheet 3 - For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
SEE STATEMENT 62					
Total. Enter on Form 8582, lines 3a, 3b, and 3c . . . . ▶	142,781.	22,475.	110,605.		

Worksheet 4 - Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total . . . . ▶			1.00		

Worksheet 5 - Allocation of Unallowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
SEE STATEMENT 63				
Total . . . . ▶		122,690.	1.00	

Worksheet 6 - Allowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
SEE STATEMENT 64				
Total . . . . ▶		129,089.		129,089.

Worksheet 7 - Activities With Losses Reported on Two or More Forms or Schedules (See instructions.)

Name of activity: SEE STATEMENT 65	(a)	(b)	(c) Ratio	(d) Unallowed loss	(e) Allowed loss
Form or schedule and line number to be reported on (see instructions): ____________					
1a Net loss plus prior year unallowed loss from form or schedule . . ▶					
b Net income from form or schedule . . . . ▶					
c Subtract line 1b from line 1a. If zero or less, enter -0- ▶					
Form or schedule and line number to be reported on (see instructions): ____________					
1a Net loss plus prior year unallowed loss from form or schedule . . ▶					
b Net income from form or schedule . . . . ▶					
c Subtract line 1b from line 1a. If zero or less, enter -0- ▶					
Form or schedule and line number to be reported on (see instructions): ____________					
1a Net loss plus prior year unallowed loss from form or schedule . . ▶					
b Net income from form or schedule . . . . ▶					
c Subtract line 1b from line 1a. If zero or less, enter -0- ▶					
Total . . . . ▶		167.	1.00		371.

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO FORM 1040

SOURCES OF COMPENSATION

OWNER-SHIP	DESCRIPTION	TOTAL WAGES	FEDERAL WITHHELD	SOC. SEC. WITHHELD	MEDICARE WITHHELD
	WAGES				
T	RUMBERGER, KIRK & CALDWEL	88,772.	18,554.	5,918.	1,384.
S	DEPARTMENT OF JUSTICE	142,609.	21,302.	7,254.	2,233.
	TOTAL - WAGES	231,381.	39,856.	13,172.	3,617.
	GRAND TOTAL	231,381.	39,856.	13,172.	3,617.

TAX EXEMPT INTEREST INCOME

TAX-EXEMPT INTEREST FROM PART., S CORP., ESTATE AND TRUST

T L.A. & C - CITLO I	283.	
T L.A. & C. LIMITED PARTNERSHIP	61,442.	
T L.A. & C - CITLO IV	948.	
T L.A. & C - CITLO VI	1,489.	
T L.A. & C - CITLO II	2,186.	
T L.A. & C - CITLO V	3,780.	
T L.A. & C. LIMITED PARTNERSHIP	709.	
TOTAL		70,837.

TAX-EXEMPT INTEREST FROM CONSOLIDATED 1099

J NORTHERN TRUST [redacted] - TAX EXEMPT	3,715.	
J NORTHERN TRUST [redacted] - TAX EXEMPT	2,137.	
TOTAL		5,852.

SUPPLEMENT TO FORM 1040

EXEMPT INTEREST DIVIDENDS

J VANGUARD HIGH-YIELD TAX-EXEMPT	1,034.	
J VANGUARD LTD-TERM TAX-EXEMPT #	256.	
J VANGUARD SHORT-TERM TAX-EXEMPT	17.	
TOTAL		1,307.

EXEMPT INTEREST DIVIDENDS FROM CONSOLIDATED 1099

J NORTHERN TRUST [redacted]	28.	
J NORTHERN TRUST [redacted]	16.	
TOTAL		44.
TOTAL TO 1040, LINE 8B		78,040.

QUALIFIED DIVIDENDS

QUALIFIED DIVIDENDS FROM FORM 1099

J DODGE & COX INTERNATIONAL STOCK FUNDS	906.	
J VANGUARD 500 INDEX FUND [redacted]	1,587.	
J VANGUARD CONVERTIBLE SECURITIES [redacted]	17.	
S ETRADE [redacted]	425.	
J NORTHERN TRUST [redacted]	145.	
J VANGUARD BROKERAGE SRV [redacted]	4,112.	
TOTAL FORM 1099 QUALIFIED DIVIDENDS		7,192.

PSHIP, S CORP. & ESTATE/TRUST QUALIFIED DIVIDENDS

T L.A. & C. LIMITED PARTNERSHIP	51,869.
T L.A. & C - CITLO VI	151.
T L.A. & C - CITLO II	5,520.
T L.A. & C - CITLO I - THE COLLECTORS	4,214.
T L.A. & C - CITLO I - DERNS MARKET O	333.
T L.A. & C - CITLO I - MALTA HEDGE	4,276.
T L.A. & C - CITLO II - CM EQUITY	1,185.
T L.A. & C - CITLO II - SOAM CAPITAL	158.

CONTINUED...

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO FORM 1040

PSHIP, S CORP. & ESTATE/TRUST QUALIFIED DIVIDENDS (CONT'D)

T L.A. & C - CITLO II - SOAM TARP OPP	40.	
T L.A. & C - SOAM TARP OPPORTUNITY FU	92.	
T L.A. & C. LIMITED PARTNERSHIP	685.	
TOTAL PASS THROUGH QUALIFIED DIVIDENDS		68,523.
TOTAL TO 1040, LINE 9B		75,715.

SOURCES OF OTHER INCOME

MISC. OTHER INCOME SUBJECT TO S.E. TAX

T SF PARTNERS, INC.	8,000.
TOTAL TO 1040, LINE 21	8,000.

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE A

GENERAL SALES TAXES

STATE SALES TAX DEDUCTION FROM OPTIONAL TABLES	2,683.
LOCAL SALES TAX DEDUCTION FROM OPTIONAL TABLES	447.
TOTAL TO SCHEDULE A, LINE 5	3,130.

REAL ESTATE TAXES

MIAMI-DADE REAL ESTATE TAXES	14,911.
TOTAL TO SCHEDULE A, LINE 6	14,911.

INVESTMENT INTEREST EXPENSE

L.A. & C - CITLO I - THE COLLECTORS	7,944.
L.A. & C - CITLO I - DERNS MARKET O	394.
L.A. & C - CITLO I - MALTA HEDGE	4,203.
L.A. & C. LIMITED PARTNERSHIP	126.
L.A.& C- CITLO V- SOUTHOCEAN	19.
SUBTOTAL OF INVESTMENT INTEREST EXPENSE	12,686.
LESS: DISALLOWED INVESTMENT INTEREST EXP./FORM 4952	NONE
TOTAL TO SCHEDULE A, LINE 14	12,686.

CASH CONTRIBUTIONS

PARTNERSHIP/S CORPORATION/ESTATE AND TRUST

50% ORGANIZATION(S)	
L.A. & C - CITLO IV - GCR CA	228.
L.A. & C. LIMITED PARTNERSHI	3.
L.A. & C. - CITLO VI - GCR C	74.

OTHER CASH CONTRIBUTIONS

CONTINUED...

SUPPLEMENT TO SCHEDULE A

CASH CONTRIBUTIONS (CONT'D)

50% ORGANIZATION(S)	
THE CUSHMAN SCHOOL	100.
TEMPLE BETH SHOLOM	1,857.
UNIVERSITY MICHIGAN	300.
TOTAL CASH CONTRIBUTIONS BEFORE LIMITATION	2,562.
CASH CONTRIBUTION LIMITATION	NONE
TOTAL TO SCHEDULE A, LINE 16	2,562.

OTHER MISC. DEDUCTIONS SUBJECT TO 2% LIMIT

PARTNERSHIP, S CORPORATION AND ESTATE AND TRUST	19,878.
[redacted]	5.
INVESTMENT EXPENSES FROM CONSOLIDATED 1099'S	20.
TOTAL TO SCHEDULE A, LINE 23	19,903.

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE A

ITEMIZED DEDUCTION WORKSHEET

1.	SCHEDULE A, LINES 4, 9, 15, 19, 20, 27, AND 28		44,642.
2.	SCHEDULE A, LINES 4, 14, 20, PLUS ANY GAMBLING AND CASUALTY OR THEFT LOSSES INCLUDED ON LINE 28		12,686.
3.	IS THE AMOUNT ON LINE 2 LESS THAN THE AMOUNT ON LINE 1? NO. X YES. SUBTRACT LINE 2 FROM LINE 1		31,956.
4.	LINE 3 MULTIPLIED BY 80% (.80)..........	25,565.	
5.	ENTER THE AMOUNT FROM FORM 1040, LINE 38	427,509.	
6.	ENTER LIMIT BASED ON FILING STATUS......	305,050.	
7.	IS THE AMOUNT ON LINE 6 LESS THAN THE AMOUNT ON LINE 5? NO. X YES. SUBTRACT LINE 6 FROM LINE 5..	122,459.	
8.	LINE 7 MULTIPLIED BY 3% (.03)	3,674.	
9.	ENTER THE SMALLER OF LINE 4 OR LINE 8		3,674.
10.	TOTAL ITEMIZED DEDUCTIONS (LINE 1 LESS LINE 9)		40,968.

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE B

NET INTEREST INCOME TO LINE 2

OTHER INTEREST INCOME

MISCELLANEOUS INTEREST INCOME

J ALLY BANK	462.	
S ETRADE [redacted]	23.	
TOTAL		485.

PART., S CORP., EST. AND TRUST INTEREST INCOME

T L.A. & C - CITLO IV	4,470.	
T L.A. & C - CITLO VI	421.	
T L.A. & C - CITLO II	575.	
T L.A. & C - CITLO V	9.	
T L.A. & C - CITLO I - THE COLLECTORS	338.	
T L.A. & C - CITLO I - DERNS MARKET O	132.	
T L.A. & C - CITLO I - MALTA HEDGE	768.	
T L.A. & C - CITLO IV - GCR CAPITAL	59.	
T L.A. & C - CITLO VI - FL RE VALUE	488.	
T L.A. & C - CITLO II - CM EQUITY	25.	
T L.A. & C - CITLO II - CARL MARKS	288.	
T L.A. & C - CITLO II - SAFE HARBOR	1.	
T L.A. & C - CITLO IV - GCR CAPITAL N	18.	
T L.A. & C. LIMITED PARTNERSHIP	104.	
T L.A. & C. - CITLO II - CARL MARKS S	1,071.	
T L.A. & C. - CITLO VI - ADLER KAWA R	6.	
T L.A.&C.- CITLO II- LYNX MEZZANINE C	1,565.	
T L.A.& C- CITLO V- PSREG 191 MEMBER	1.	
T L.A.& C- CITLO V- TP M 451 D LLC	2.	
TOTAL		10,341.

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE B

TAX-EXEMPT INTEREST FROM PART., S CORP., ESTATE AND TRUST

T L.A. & C - CITLO I	283.	
T L.A. & C. LIMITED PARTNERSHIP	61,442.	
T L.A. & C - CITLO IV	948.	
T L.A. & C - CITLO VI	1,489.	
T L.A. & C - CITLO II	2,186.	
T L.A. & C - CITLO V	3,780.	
T L.A. & C. LIMITED PARTNERSHIP	709.	
TOTAL		70,837.

TAX-EXEMPT INTEREST FROM CONSOLIDATED 1099

J NORTHERN TRUST [redacted] - TAX EXEMPT	3,715.	
J NORTHERN TRUST [redacted] - TAX EXEMPT	2,137.	
TOTAL		5,852.

TOTAL GROSS INTEREST INCOME		87,515.

LESS: ADJUSTMENTS TO INTEREST INCOME

TAX-EXEMPT INTEREST	(76,689.)	
SUBTOTAL		(76,689.)
TOTAL NET INTEREST INCOME TO LINE 2		10,826.

SUPPLEMENT TO SCHEDULE B

DIVIDEND INCOME

ORDINARY DIVIDENDS

J DODGE & COX INTERNATIONAL STOCK FUNDS	906.	
J VANGUARD 500 INDEX FUND [redacted]	1,587.	
J VANGUARD CONVERTIBLE SECURITIES [redacted]	190.	
J VANGUARD PRIME MONEY MKT [redacted]	30.	
S ETRADE #[redacted]	2,144.	
J NORTHERN TRUST [redacted]	6,531.	
J NORTHERN TRUST [redacted]	87.	
J VANGUARD BROKERAGE SRV [redacted]	5,123.	
TOTAL ORDINARY DIVIDENDS		16,598.

PSHIP, S CORP. & ESTATE/TRUST DIVIDENDS

T L.A. & C - CITLO I	216.	
T L.A. & C. LIMITED PARTNERSHIP	59,955.	
T L.A. & C - CITLO IV	711.	
T L.A. & C - CITLO VI	1,962.	
T L.A. & C - CITLO II	10,019.	
T L.A. & C - CITLO V	730.	
T L.A. & C - CITLO I - THE COLLECTORS	7,526.	
T L.A. & C - CITLO I - DERNS MARKET O	2,517.	
T L.A. & C - CITLO I - MALTA HEDGE	5,086.	
T L.A. & C - CITLO II - CM EQUITY	1,185.	
T L.A. & C - CITLO II - SOAM CAPITAL	158.	
T L.A. & C - CITLO II - SOAM TARP OPP	40.	
T L.A. & C - SOAM TARP OPPORTUNITY FU	92.	
T L.A. & C. LIMITED PARTNERSHIP	911.	
TOTAL PASS THROUGH DIVIDENDS		91,108.
TOTAL GROSS DIVIDEND INCOME		107,706.
TOTAL DIVIDEND INCOME TO LINE 6 OF SCHEDULE B		107,706.

STATEMENT 9

SUPPLEMENT TO SCHEDULE D

PART I SHORT-TERM CAPITAL GAINS AND LOSSES - ASSETS HELD ONE YEAR OR LESS
LINE 5 - SHORT-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS, AND FIDUCIARIES

ACTIVITY NAME	GAIN/LOSS
L.A. & C. LIMITED PARTNERSHIP	-21,604.
L.A. & C - CITLO VI	-46.
L.A. & C - CITLO II	-2,195.
L.A. & C - CITLO V	-169.
L.A. & C - CITLO I - THE COLLECTORS	-14,825.
L.A. & C - CITLO I - DERNS MARKET O	-354.
L.A. & C - CITLO I - MALTA HEDGE	-15,460.
L.A. & C - CITLO II - CARL MARKS	5.
L.A. & C. LIMITED PARTNERSHIP	-547.
L.A. & C. - CITLO II - CARL MARKS S	471.
TOTAL SHORT-TERM GAINS AND LOSSES FROM K-1'S	-54,724.
TOTAL TO SCHEDULE D, LINE 5	-54,724.

* INDICATES 100% DISPOSITION OF THE ACTIVITY

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE D

PART II LONG-TERM CAPITAL GAINS AND LOSSES - ASSETS HELD MORE THAN ONE YEAR
LINE 12 - LONG-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS, AND FIDUCIARIES

ACTIVITY NAME	GAIN/LOSS
L.A. & C. LIMITED PARTNERSHIP	44,393.
L.A. & C - CITLO IV	22.
L.A. & C - CITLO VI	56.
L.A. & C - CITLO II	6,969.
L.A. & C - CITLO V	-9.
L.A. & C - CITLO I - THE COLLECTORS	29,004.
L.A. & C - CITLO I - DERNS MARKET O	416.
L.A. & C - CITLO I - MALTA HEDGE	35,220.
L.A. & C - CITLO VI - FL RE VALUE	76.
L.A. & C - CITLO II - CM EQUITY	16.
L.A. & C - CITLO II - CARL MARKS	169.
L.A. & C - CITLO II - SOAM CAPITAL	6,628.
L.A. & C - CITLO II - SOAM TARP OPP	224.
L.A. & C - SOAM TARP OPPORTUNITY FU	12.
L.A. & C. LIMITED PARTNERSHIP	1,244.
L.A. & C. - CITLO II - CARL MARKS S	20.
TOTAL LONG-TERM GAINS AND LOSSES FROM K-1'S	124,460.
TOTAL TO SCHEDULE D, LINE 12	124,460.

* INDICATES 100% DISPOSITION OF THE ACTIVITY

SUPPLEMENT TO SCHEDULE D

PART II LONG-TERM CAPITAL GAINS AND LOSSES
LINE 13 CAPITAL GAIN DISTRIBUTIONS

NAME OF PAYER	CAPITAL GAINS
VANGUARD CONVERTIBLE SECURITIES [redacted]	226.
SUBTOTAL FROM 1099-DIV	226.
NORTHERN TRUST [redacted]	347.
NORTHERN TRUST [redacted]	19.
VANGUARD BROKERAGE SRV [redacted]	20.
SUBTOTAL FROM CONSOLIDATED-1099	386.
TOTAL TO SCHEDULE D, LINE 13	612.

STATEMENT 12

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE E

INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

(A) NAME	(B) P OR S	(C) F P	(D) EIN	(E) NOT AT-RISK N	(F) PASSIVE LOSS FROM 8582	(G) PASSIVE INCOME FROM K-1	(H) NONPASSIVE LOSS FROM K-1	(I) SEC 179 DEDUCTION	(J) NONPASSIVE INCOME FROM K-1
L.A. & C - CITLO I	P		[redacted]			NONE			
L.A. & C. LIMITED PARTNER	P		[redacted]						9.
L.A. & C - CITLO IV	P		[redacted]			NONE			
L.A. & C - CITLO VI	P		[redacted]			NONE			
L.A. & C - CITLO II	P		[redacted]			NONE			
L.A. & C - CITLO V	P		[redacted]			NONE			
L.A. & C - LEXINGTON HI P	P		[redacted]			1,958.			
L.A. & C - LEXINGTON HI P	P		[redacted]		74,466.				
L.A. & C - CSF HOLDINGS L	P		[redacted]			NONE			
L.A. & C - CITLO I - THE	P		[redacted]		5,048.				
L.A. & C - CITLO I - THE	P		[redacted]		10,874.				
L.A. & C - CITLO I - DERN	P		[redacted]			236.			
L.A. & C - CITLO I - MALT	P		[redacted]			6.			
L.A. & C - CITLO I - MALT	P		[redacted]		323.				
L.A. & C - CITLO I - KAS	P		[redacted]			2,734.			
L.A. & C - CITLO IV - GCR	P		[redacted]			2,650.			
L.A. & C - CITLO IV - GCR	P		[redacted]		8,148.				
L.A. & C - CITLO VI - FL	P		[redacted]			119.			
L.A. & C - CITLO II - CM	P		[redacted]		282.				
L.A. & C - CITLO II - CM	P		[redacted]		3,977.				
2KAS PARTNERS LLC	P		[redacted]		1,139.				
3KAS PARTNERS LLC	P		[redacted]			2,190.			
4KAS PARTNERS LLC	P		[redacted]			5,624.			
KAS GOLD LLC	P		[redacted]		5,464.				
KAS AIRPORT LLC	P		[redacted]		5,800.				

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE E

INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

(A) NAME	(B) P OR S	(C) F P	(D) EIN	(E) NOT AT-RISK N	(F) PASSIVE LOSS FROM 8582	(G) PASSIVE INCOME FROM K-1	(H) NONPASSIVE LOSS FROM K-1	(I) SEC 179 DEDUCTION	(J) NONPASSIVE INCOME FROM K-1
L.A. & C - CITLO II - BRA	P		[redacted]	[redacted]	72.				
L.A. & C - CITLO II - BRA	P		[redacted]	[redacted]	90.				
L.A. & C - CITLO II - CAR	P		[redacted]	[redacted]		NONE			
L.A. & C - CITLO II - SOA	P		[redacted]	[redacted]		3.			
L.A. & C - CITLO II - SOA	P		[redacted]	[redacted]	13.				
L.A. & C - CITLO II - PSS	P		[redacted]	[redacted]		NONE			
L.A. & C - CITLO II - SAF	P		[redacted]	[redacted]		15.			
L.A. & C PARTNERSHIP	P		[redacted]	[redacted]		NONE			
6 KAS PARTNERS, LLC	P		[redacted]	[redacted]		20,012.			
KAS POMPANO BEACH, LLC	P		[redacted]	[redacted]		4,491.			
KAS DATURA, LLC	P		[redacted]	[redacted]		NONE			
KAS DATURA, LLC - PYA	P		[redacted]	[redacted]	2,827.				
L.A. & C - CITLO II - SOA	P		[redacted]	[redacted]		NONE			
L.A. & C - CITLO II - G&C	P		[redacted]	[redacted]	2,148.				
L.A. & C - CITLO II - G&C	P		[redacted]	[redacted]	41.				
L.A. & C - SOAM TARP OPPO	P		[redacted]	[redacted]		NONE			
L.A. & C - CITLO IV - GCR	P		[redacted]	[redacted]	2,329.				
L.A. & C - CITLO IV - GCR	P		[redacted]	[redacted]	1,234.				
L.A. & C - CITLO IV - GCR	P		[redacted]	[redacted]		NONE			
L.A. & C - CITLO IV - GCR	P		[redacted]	[redacted]	613.				
L.A. & C. LIMITED PARTNER	P		[redacted]	[redacted]	18.				
L.A. & C. LIMITED PARTNER	P		[redacted]	[redacted]	149.				
KAS CENTRAL	P		[redacted]	[redacted]		1,820.			
KAS CENTRAL - PYA	P		[redacted]	[redacted]	5,744.				
KAS GROVE	P		[redacted]	[redacted]		27,082.			
5KAS PARTNERS	P		[redacted]	[redacted]		42.			

LAURA ANNE STUZIN & DANIEL J BERNSTEIN

SUPPLEMENT TO SCHEDULE E

INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

(A) NAME	(B) P OR S	(C) F P	(D) EIN	(E) NOT AT-RISK N	(F) PASSIVE LOSS FROM 8582	(G) PASSIVE INCOME FROM K-1	(H) NONPASSIVE LOSS FROM K-1	(I) SEC 179 DEDUCTION	(J) NONPASSIVE INCOME FROM K-1
L.A. & C. - CITLO II - CA	P		[redacted]			NONE			
L.A. & C. - CITLO VI - AD	P		[redacted]			140.			
L.A. & C. - CITLO VI - AD	P		[redacted]		127.				
L.A.&C.- CITLO II- LYNX M	P		[redacted]			NONE			
L.A.& C. - CITLO II - SOA	P		[redacted]			NONE			
L.A. & C. - CITLO VI - GC	P		[redacted]			246.			
L.A. & C. - CITLO VI - GC	P		[redacted]		1,610.				
KAS WINKLER	P		[redacted]			3,751.			
L.A. & C. - CITLO VI - GC	P		[redacted]			75.			
L.A.& C- CITLO V- SAN ANT	P		[redacted]		3.				
L.A.& C- CITLO V- PSREG 1	P		[redacted]			3.			
L.A.& C- CITLO V- PSREG A	P		[redacted]		70.				
L.A.& C- CITLO V- PSREG M	P		[redacted]		2.				
L.A.& C- CITLO V- TP M 45	P		[redacted]			21.			
L.A.& C- CITLO V- SOUTHOC	P		[redacted]		100.				
L.A. & C - UNITED STATES	P		[redacted]			NONE			
				TOTALS	132,711.	73,218.			9.

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - LEXINGTON HI PARTNERS
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	1,958.
ALLOWABLE INCOME/LOSS	1,958.

K-1 NAME: L.A. & C - CITLO I - THE COLLECTORS FUND
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
FROM PASS-THROUGH ENTITY	68.
LESS:	
FROM PASSTHROUGH ENTITIES	5,116.
NET INCOME/LOSS BEFORE LIMITATIONS	-5,048.
ALLOWABLE INCOME/LOSS	-5,048.

K-1 NAME: L.A. & C - CITLO I - DERNS MARKET OPP
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	218.
RENTAL REAL ESTATE INCOME OR LOSS	1.
PLUS:	
FROM PASS-THROUGH ENTITY	17.
ALLOWABLE INCOME/LOSS	236.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - CITLO I - MALTA HEDGE
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
FROM PASS-THROUGH ENTITY	6.
ALLOWABLE INCOME/LOSS	6.

K-1 NAME: L.A. & C - CITLO I - KAS PARTNERS
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	2,734.
ALLOWABLE INCOME/LOSS	2,734.

K-1 NAME: L.A. & C - CITLO IV - GCR CAPITAL
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	2,650.
ALLOWABLE INCOME/LOSS	2,650.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - CITLO VI - FL RE VALUE
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	342.
RENTAL REAL ESTATE INCOME OR LOSS	-223.
ALLOWABLE INCOME/LOSS	119.

K-1 NAME: L.A. & C - CITLO II - CM EQUITY
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	-282.
ALLOWABLE INCOME/LOSS	-282.

K-1 NAME: 2KAS PARTNERS LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-1,139.
ALLOWABLE INCOME/LOSS	-1,139.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: 3KAS PARTNERS LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	2,190.
ALLOWABLE INCOME/LOSS	2,190.

K-1 NAME: 4KAS PARTNERS LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	5,624.
ALLOWABLE INCOME/LOSS	5,624.

K-1 NAME: KAS GOLD LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-5,464.
ALLOWABLE INCOME/LOSS	-5,464.

K-1 NAME: KAS AIRPORT LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-5,800.
ALLOWABLE INCOME/LOSS	-5,800.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - CITLO II - BRAVA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	-72.
ALLOWABLE INCOME/LOSS	-72.

K-1 NAME: L.A. & C - CITLO II - SOAM CAPITAL
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
FROM PASS-THROUGH ENTITY	3.
ALLOWABLE INCOME/LOSS	3.

K-1 NAME: L.A. & C - CITLO II - SAFE HARBOR
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
PASS-THROUGH ENTITY	15.
ALLOWABLE INCOME/LOSS	15.

(THIS PASSIVE ACTIVITY WAS ENTIRELY DISPOSED OF)

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: 6 KAS PARTNERS, LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	20,061.
OTHER RENTAL INCOME OR LOSS	-49.
ALLOWABLE INCOME/LOSS	20,012.

K-1 NAME: KAS POMPANO BEACH, LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	4,491.
ALLOWABLE INCOME/LOSS	4,491.

K-1 NAME: KAS DATURA, LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ALLOWABLE INCOME/LOSS	NONE

K-1 NAME: L.A. & C - CITLO II - G&C SUMMER INVESTORS LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-2,148.
ALLOWABLE INCOME/LOSS	-2,148.

(THIS PASSIVE ACTIVITY WAS ENTIRELY DISPOSED OF)

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - CITLO IV - GCR CAPITAL NY
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-2,329.
ALLOWABLE INCOME/LOSS	-2,329.

K-1 NAME: L.A. & C - CITLO IV - GCR CAPITAL II LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ALLOWABLE INCOME/LOSS	NONE

K-1 NAME: L.A. & C. LIMITED PARTNERSHIP
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	22.
RENTAL REAL ESTATE INCOME OR LOSS	10.
PLUS:	
FROM PASS-THROUGH ENTITIES	1.
LESS:	
FROM PASS-THROUGH ENTITIES	51.
NET INCOME/LOSS BEFORE LIMITATIONS	-18.
ALLOWABLE INCOME/LOSS	-18.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: KAS CENTRAL
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	1,820.
ALLOWABLE INCOME/LOSS	1,820.

K-1 NAME: KAS GROVE
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	27,082.
ALLOWABLE INCOME/LOSS	27,082.

K-1 NAME: 5KAS PARTNERS
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	42.
ALLOWABLE INCOME/LOSS	42.

K-1 NAME: L.A. & C. - CITLO VI - ADLER KAWA RE FUND II
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	140.
ALLOWABLE INCOME/LOSS	140.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C. - CITLO VI - GCR CAPITAL NY
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	246.
ALLOWABLE INCOME/LOSS	246.

K-1 NAME: KAS WINKLER
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	3,751.
ALLOWABLE INCOME/LOSS	3,751.

K-1 NAME: L.A. & C. - CITLO VI - GCR CAPITAL II LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	75.
ALLOWABLE INCOME/LOSS	75.

K-1 NAME: L.A.& C- CITLO V- SAN ANTONION JOINT VENTURE
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-3.
ALLOWABLE INCOME/LOSS	-3.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A.& C- CITLO V- PSREG 191 MEMBER
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	3.
ALLOWABLE INCOME/LOSS	3.

K-1 NAME: L.A.& C- CITLO V- PSREG ARDEN VILLAS
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-70.
ALLOWABLE INCOME/LOSS	-70.

K-1 NAME: L.A.& C- CITLO V- PSREG M NORTH PARTNER, LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-2.
ALLOWABLE INCOME/LOSS	-2.

K-1 NAME: L.A.& C- CITLO V- TP M 451 D LLC
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
ORDINARY INCOME OR LOSS	14.
RENTAL REAL ESTATE INCOME OR LOSS	7.
ALLOWABLE INCOME/LOSS	21.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A.& C- CITLO V- SOUTHOCEAN
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
RENTAL REAL ESTATE INCOME OR LOSS	-100.
ALLOWABLE INCOME/LOSS	-100.

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

COLUMNS (H) & (J) - NONPASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C. LIMITED PARTNERSHIP
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
FROM PASS-THROUGH ENTITY	9.
INCOME/LOSS AFTER AT-RISK ADJ.	9.
ALLOWABLE INCOME/LOSS	9.

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - LEXINGTON HI PARTN - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	74,466.
ALLOWABLE INCOME/LOSS	74,466.

K-1 NAME: L.A. & C - CITLO I - THE COLL - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	10,874.
ALLOWABLE INCOME/LOSS	10,874.

K-1 NAME: L.A. & C - CITLO I - MALTA HE - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	323.
ALLOWABLE INCOME/LOSS	323.

K-1 NAME: L.A. & C - CITLO IV - GCR CAP - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	8,148.
ALLOWABLE INCOME/LOSS	8,148.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - CITLO II - CM EQUI - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	3,977.
ALLOWABLE INCOME/LOSS	3,977.

K-1 NAME: L.A. & C - CITLO II - BRAVA - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	90.
ALLOWABLE INCOME/LOSS	90.

K-1 NAME: L.A. & C - CITLO II - SOAM CA - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	13.
ALLOWABLE INCOME/LOSS	13.

K-1 NAME: KAS DATURA, LLC - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	2,827.
ALLOWABLE INCOME/LOSS	2,827.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C - CITLO II - G&C SUM - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	41.
ALLOWABLE INCOME/LOSS	41.

(THIS PASSIVE ACTIVITY WAS ENTIRELY DISPOSED OF)

K-1 NAME: L.A. & C - CITLO IV - GCR CAP - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	1,234.
ALLOWABLE INCOME/LOSS	1,234.

K-1 NAME: L.A. & C - CITLO IV - GCR CAP - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	613.
ALLOWABLE INCOME/LOSS	613.

CONTINUED...

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS (CONT'D)

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: L.A. & C. LIMITED PARTNERSHIP - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	149.
ALLOWABLE INCOME/LOSS	149.

K-1 NAME: KAS CENTRAL - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	5,744.
ALLOWABLE INCOME/LOSS	5,744.

K-1 NAME: L.A. & C. - CITLO VI - ADLER - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	127.
ALLOWABLE INCOME/LOSS	127.

K-1 NAME: L.A. & C. - CITLO VI - GCR CA - PYA
ID NUMBER: [redacted]

DESCRIPTION	INCOME/LOSS
SUSPENDED LOSS CARRYOVER	1,610.
ALLOWABLE INCOME/LOSS	1,610.

SUPPLEMENT TO SCHEDULE SE

TAXPAYER'S NET SELF-EMPLOYMENT INCOME

NET NONFARM PROFIT OR (LOSS)

MISCELLANEOUS INCOME SUBJECT TO SE TAX	8,000.
TOTAL NET NONFARM PROFIT OR (LOSS), SECTION A, LINE 2	8,000.

SUPPLEMENT TO FORM 1116

ITEMIZED DEDUCTIONS NOT DIRECTLY ALLOCABLE TO FOREIGN SOURCE INCOME

TOTAL ITEMIZED DEDUCTIONS	40,968.
LESS:	
ITEMIZED DEDUCTIONS DIRECTLY ALLOCABLE TO U.S. SOURCES	2,267.
SCHEDULE A INTEREST EXPENSE	12,686.
ITEMIZED DEDUCTIONS NOT DIRECTLY ALLOCABLE	26,015.

SUPPLEMENT TO FORM 1116

SCHEDULE FOR FOREIGN TAXES PAID (ACCRUED)

NAME OF FOREIGN COUNTRY: OTHER COUNTRIES
TYPE OF INCOME: PASSIVE INCOME

TAXES WITHHELD ON:	TOTAL FOREIGN TAXES IN FOREIGN CURRENCY	CONVERSION RATE	IN U.S. DOLLARS	DATE PAID OR ACCRUED
DIVIDENDS			69.	
OTHER			84.	
OTHER			383.	
OTHER			1.	
OTHER			3.	
OTHER			1.	
OTHER			5.	
TOTAL			546.	

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SUPPLEMENT TO FORM 1116

FOREIGN TAX CREDIT CARRYBACK/CARRYOVER - PASSIVE CATEGORY INCOME

YEAR CREDIT AROSE	TTL. FOREIGN TAXES PAID	FOREIGN TAX CREDIT USED	ADJUSTMENT FOR REFUND	BALANCE
2004	398.	398.		
2005	686.	686.		
2006	90.	90.		
2007	1,284.	1,284.		
2008	1,045.	1,045.		
2009	119.	119.		
2010	53.	53.		
2011	242.	242.		
2012	646.	435.		211.
2013	603.	505.		98.
TOTAL CARRYBACK/CARRYOVER TO 2014				309.

SUPPLEMENT TO FORM 1116

WORKSHEET FOR LINE 18
USING WORLDWIDE QUALIFIED DIVIDENDS AND CG TAX WORKSHEET AMOUNTS

1.	AMOUNT FROM FORM 1040, LINE 41		386,541.
2.	N/A		
3.	N/A		
4.	N/A		
5.	N/A		
6.	WORLDWIDE 20% GAINS (CG TAX WS, LINE 22)		
7.	MULTIPLY LINE 6 BY .4949		
8.	WORLDWIDE 15% GAINS (CG TAX WS, LINE 19)	136,158.	
9.	MULTIPLY LINE 8 BY .6212	84,581.	
10	WORLDWIDE 0% GAINS (CG TAX WS, LINE 11)		
11.	ADD LINES 7, 9 AND 10		84,581.
12.	SUBTRACT LINE 11 FROM LINE 1		301,960.

SUPPLEMENT TO FORM 1116 - ALTERNATIVE MINIMUM TAX

FOREIGN TAX CREDIT CARRYBACK/CARRYOVER - PASSIVE CATEGORY INCOME

YEAR CREDIT AROSE	TTL. FOREIGN TAXES PAID	FOREIGN TAX CREDIT USED	ADJUSTMENT FOR REFUND	BALANCE
2004	398.	398.		
2005	686.	686.		
2006	90.	90.		
2007	1,284.	1,284.		
2008	1,045.	1,045.		
2009	119.	119.		
2010	53.	245.		
2011	242.	242.		
2012	646.	470.		176.
2013	603.	574.		29.
TOTAL CARRYBACK/CARRYOVER TO 2014				205.

SUPPLEMENT TO FORM 1116 - ALTERNATIVE MINIMUM TAX

WORKSHEET FOR LINE 18

1.	AMOUNT FROM FORM 6251, LINE 28		413,643.
2.	N/A		
3.	N/A		
4.	WORLDWIDE 25% GAINS (FORM 6251, LINE 60)		
5.	MULTIPLY LINE 4 BY .1071		
6.	WORLDWIDE 20% GAINS (FORM 6251, LINE 57)		
7.	MULTIPLY LINE 6 BY .2857		
8.	WORLDWIDE 15% GAINS (FORM 6251, LINE 54)	136,158.	
9.	MULTIPLY LINE 8 BY .4643	63,218.	
10.	WORLDWIDE 0% GAINS (FORM 6251, LINE 47)		
11.	ADD LINES 5, 7, 9 AND 10		63,218.
12.	SUBTRACT LINE 11 FROM LINE 1		350,425.

SUPPLEMENT TO FORM 1116 - ALTERNATIVE MINIMUM TAX

RATABLY ALLOCABLE ITEMIZED DEDUCTIONS

ITEMIZED DEDUCTIONS BEFORE PHASE-OUT	15,248.
LESS: ITEMIZED DEDUCTIONS DIRECTLY ALLOCABLE TO U.S. SOURCES	2,562.
ITEMIZED DEDUCTIONS DIRECTLY ALLOCABLE TO FOREIGN SOURCES	NONE
INTEREST EXPENSE	12,686.
TOTAL DIRECTLY ALLOCABLE ITEMIZED DEDUCTIONS	15,248.
RATABLY ALLOCABLE ITEMIZED DEDUCTIONS	NONE

GROSS INCOME RECOMPUTED FOR ALTERNATIVE MINIMUM TAX

GROSS INCOME FROM ALL SOURCES FOR ALLOCATION OF ITEMIZED DEDUCTIONS (REGULAR TAX)	626,835.
PLUS ADJUSTMENTS AND PREFERENCES RELATED TO INCOME:	
ADJUSTED GAIN OR LOSS	1.
GROSS INCOME FROM ALL SOURCES FOR ALLOCATION OF ITEMIZED DEDUCTIONS (ALTERNATIVE MINIMUM TAX)	626,836.
LESS EXCLUDED AND EXEMPT INCOME	NONE
PLUS AMOUNT FROM FORM 6251, LINE 12	177.
GROSS INCOME FROM ALL SOURCES FOR ALLOCATION OF INTEREST DEDUCTION (ALTERNATIVE MINIMUM TAX)	627,013.

FORM 4797 - PART I: SALES OR EXCHANGES OF PROPERTY USED IN A TRADE OR BUSINESS AND INVOLUNTARY CONVERSIONS FROM OTHER THAN CASUALTY OR THEFTS

(A) DESCRIP. OF PROPERTY	(B) DATE ACQUIRED	(C) DATE SOLD	(D) GROSS SALES PRICE	(E) DEPRECIATION ALLOWED	(F) COST OR OTHER BASIS PLUS IMPROVEMENTS & EXPENSE OF SALE	(G) LOSS/GAIN	
L.A. & C - CITLO II - CARL MARKS						-4.	PAL
L.A. & C PARTNERSHIP						-161.	PAL
L.A. & C. LIMITED PARTNERSHIP						-204.	PAL
L.A. & C - CITLO I - KAS PARTNERS						18,945.	
2KAS PARTNERS LLC						44,297.	
L.A. & C - CITLO II - G&C SUMMER IN						6,069.	
L.A. & C. LIMITED PARTNERSHIP						252.	
PART I SEC. 1231 GAIN AND LOSS						69,194.	

FORM 4797 - PART I: SALES OR EXCHANGES OF PROPERTY USED IN A TRADE OR BUSINESS AND INVOLUNTARY CONVERSIONS FROM OTHER THAN CASUALTY OR THEFTS - ALT. MINIMUM TAX

(A) DESCRIP. OF PROPERTY	(B) DATE ACQUIRED	(C) DATE SOLD	(D) GROSS SALES PRICE	(E) DEPRECIATION ALLOWED	(F) COST OR OTHER BASIS PLUS IMPROVEMENTS & EXPENSE OF SALE	(G) LOSS/GAIN	
L.A. & C - CITLO II - CARL MARKS						-4.	PAL
L.A. & C PARTNERSHIP						-161.	PAL
L.A. & C. LIMITED PARTNERSHIP						-203.	PAL
L.A. & C - CITLO I - KAS PARTNERS						18,945.	
2KAS PARTNERS LLC						44,297.	
L.A. & C - CITLO II - G&C SUMMER IN						6,069.	
L.A. & C. LIMITED PARTNERSHIP						252.	
PART I SEC. 1231 GAIN AND LOSS						69,195.	

SUPPLEMENT TO FORM 6251

DISPOSITION OF PROPERTY

SOURCE:	REGULAR GAIN/LOSS	AMT GAIN/LOSS	GAIN/LOSS ADJUSTMENT
FORM 4797	69,194.	69,195.	1.
TOTAL TO FORM 6251, LINE 17			1.

PASSIVE ACTIVITY LOSS

DESCRIPTION	REGULAR INC./LOSS	AMT INC./LOSS	PASSIVE ADJUSTMENT
L.A. & C - LEXINGTON HI PARTNERS	-72,508.	-72,263.	245.
L.A. & C - CITLO I - THE COLLECTORS	-15,922.	-15,895.	27.
L.A. & C - CITLO I - MALTA HEDGE	-317.	-316.	1.
L.A. & C - CITLO IV - GCR CAPITAL	-5,498.	-5,292.	206.
L.A. & C - CITLO VI - FL RE VALUE	119.	171.	52.
L.A. & C - CITLO II - CM EQUITY	-4,259.	-4,245.	14.
KAS DATURA, LLC	-2,827.	-2,819.	8.
L.A. & C - CITLO II - G&C SUMMER IN	-2,189.	-1,812.	377.
L.A. & C - CITLO IV - GCR CAPITAL N	-3,563.	-3,421.	142.
L.A. & C - CITLO IV - GCR CAPITAL I	-613.	-595.	18.
L.A. & C. LIMITED PARTNERSHIP	-167.	-160.	7.
KAS CENTRAL	-3,924.	-3,910.	14.
L.A. & C. - CITLO VI - ADLER KAWA R	13.	14.	1.
L.A. & C. - CITLO VI - GCR CAPITAL	-1,364.	-1,306.	58.
L.A. & C. - CITLO VI - GCR CAPITAL	75.	106.	31.
L.A.& C- CITLO V- PSREG 191 MEMBER	3.	4.	1.
L.A.& C- CITLO V- PSREG ARDEN VILLA	-70.	-68.	2.
TOTAL TO FORM 6251, LINE 19			1,204.

STATEMENT 42

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - LEXINGTON HI PARTNERS		
ORDINARY INCOME OR LOSS	1,958.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	1,958.	1,958.
LESS: PRIOR YEAR SUSPENDED LOSS	74,466.	74,221.
INCOME OR LOSS AFTER PASSIVE	-72,508.	-72,263.
ALLOWABLE INCOME OR LOSS	-72,508.	-72,263.

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - CITLO I - THE COLLECTORS		
INCOME OR LOSS	NONE	
PLUS: OTHER INCOME	68.	
LESS: OTHER DEDUCTIONS	5,116.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	-5,048.	
PLUS: OTHER INCOME		68.
LESS: OTHER DEDUCTIONS		5,116.
AMT INCOME OR LOSS BEFORE LIMITATIONS		-5,048.
LESS: PRIOR YEAR SUSPENDED LOSS	10,874.	10,847.
INCOME OR LOSS AFTER PASSIVE	-15,922.	-15,895.
ALLOWABLE INCOME OR LOSS	-15,922.	-15,895.

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - CITLO I - MALTA HEDGE		
INCOME OR LOSS	NONE	
PLUS: OTHER INCOME	6.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	6.	
PLUS: OTHER INCOME		6.
AMT INCOME OR LOSS BEFORE LIMITATIONS		6.
LESS: PRIOR YEAR SUSPENDED LOSS	323.	322.
INCOME OR LOSS AFTER PASSIVE	-317.	-316.
ALLOWABLE INCOME OR LOSS	-317.	-316.

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - CITLO IV - GCR CAPITAL		
RENTAL REAL ESTATE INCOME OR LOSS	2,650.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	2,650.	2,650.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		-23.
AMT INCOME OR LOSS BEFORE LIMITATIONS		2,627.
LESS: PRIOR YEAR SUSPENDED LOSS	8,148.	7,919.
INCOME OR LOSS AFTER PASSIVE	-5,498.	-5,292.
ALLOWABLE INCOME OR LOSS	-5,498.	-5,292.

CONTINUED...

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - CITLO VI - FL RE VALUE		
ORDINARY INCOME OR LOSS	342.	
RENTAL REAL ESTATE INCOME OR LOSS	-223.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	119.	119.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		52.
AMT INCOME OR LOSS BEFORE LIMITATIONS		171.
ALLOWABLE INCOME OR LOSS	119.	171.
ACTIVITY - L.A. & C - CITLO II - CM EQUITY		
ORDINARY INCOME OR LOSS	-282.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	-282.	-282.
LESS: PRIOR YEAR SUSPENDED LOSS	3,977.	3,963.
INCOME OR LOSS AFTER PASSIVE	-4,259.	-4,245.
ALLOWABLE INCOME OR LOSS	-4,259.	-4,245.

CONTINUED...

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - KAS DATURA, LLC		
INCOME OR LOSS	NONE	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS		
LESS: PRIOR YEAR SUSPENDED LOSS	2,827.	2,819.
INCOME OR LOSS AFTER PASSIVE	-2,827.	-2,819.
ALLOWABLE INCOME OR LOSS	-2,827.	-2,819.
ACTIVITY - L.A. & C - CITLO II - G&C SUMMER IN		
RENTAL REAL ESTATE INCOME OR LOSS	-2,148.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	-2,148.	-2,148.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		27.
POST-86 DISPOSITION GAIN OR LOSS		350.
AMT INCOME OR LOSS BEFORE LIMITATIONS		-1,771.
LESS: PRIOR YEAR SUSPENDED LOSS	41.	41.
INCOME OR LOSS AFTER PASSIVE	-2,189.	-1,812.
ALLOWABLE INCOME OR LOSS	-2,189.	-1,812.

CONTINUED...

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - CITLO IV - GCR CAPITAL N		
RENTAL REAL ESTATE INCOME OR LOSS	-2,329.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	-2,329.	-2,329.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		79.
AMT INCOME OR LOSS BEFORE LIMITATIONS		-2,250.
LESS: PRIOR YEAR SUSPENDED LOSS	1,234.	1,171.
INCOME OR LOSS AFTER PASSIVE	-3,563.	-3,421.
ALLOWABLE INCOME OR LOSS	-3,563.	-3,421.

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C - CITLO IV - GCR CAPITAL I		
INCOME OR LOSS	NONE	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS		
LESS: PRIOR YEAR SUSPENDED LOSS	613.	595.
INCOME OR LOSS AFTER PASSIVE	-613.	-595.
ALLOWABLE INCOME OR LOSS	-613.	-595.

CONTINUED...

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C. LIMITED PARTNERSHIP		
ORDINARY INCOME OR LOSS	22.	
RENTAL REAL ESTATE INCOME OR LOSS	10.	
PLUS: OTHER INCOME	1.	
LESS: OTHER DEDUCTIONS	51.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	-18.	32.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		2.
POST-86 DISPOSITION GAIN OR LOSS		3.
OTHER INCOME		1.
LESS: OTHER DEDUCTIONS		51.
AMT INCOME OR LOSS BEFORE LIMITATIONS		-13.
LESS: PRIOR YEAR SUSPENDED LOSS	149.	147.
INCOME OR LOSS AFTER PASSIVE	-167.	-160.
ALLOWABLE INCOME OR LOSS	-167.	-160.
ACTIVITY - KAS CENTRAL		
RENTAL REAL ESTATE INCOME OR LOSS	1,820.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	1,820.	1,820.
LESS: PRIOR YEAR SUSPENDED LOSS	5,744.	5,730.
INCOME OR LOSS AFTER PASSIVE	-3,924.	-3,910.
ALLOWABLE INCOME OR LOSS	-3,924.	-3,910.

CONTINUED...

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C. - CITLO VI - ADLER KAWA R		
RENTAL REAL ESTATE INCOME OR LOSS	140.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	140.	140.
LESS: PRIOR YEAR SUSPENDED LOSS	127.	126.
INCOME OR LOSS AFTER PASSIVE	13.	14.
ALLOWABLE INCOME OR LOSS	13.	14.

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C. - CITLO VI - GCR CAPITAL		
RENTAL REAL ESTATE INCOME OR LOSS	246.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	246.	246.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		54.
AMT INCOME OR LOSS BEFORE LIMITATIONS		300.
LESS: PRIOR YEAR SUSPENDED LOSS	1,610.	1,606.
INCOME OR LOSS AFTER PASSIVE	-1,364.	-1,306.
ALLOWABLE INCOME OR LOSS	-1,364.	-1,306.

CONTINUED...

SUPPLEMENT TO FORM 6251

PASSIVE ACTIVITY - INCOME AND LOSS DETAIL (CONT'D)

	REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - L.A. & C. - CITLO VI - GCR CAPITAL		
RENTAL REAL ESTATE INCOME OR LOSS	75.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	75.	75.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		31.
AMT INCOME OR LOSS BEFORE LIMITATIONS		106.
ALLOWABLE INCOME OR LOSS	75.	106.
ACTIVITY - L.A.& C- CITLO V- PSREG 191 MEMBER		
RENTAL REAL ESTATE INCOME OR LOSS	3.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	3.	3.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		1.
AMT INCOME OR LOSS BEFORE LIMITATIONS		4.
ALLOWABLE INCOME OR LOSS	3.	4.
ACTIVITY - L.A.& C- CITLO V- PSREG ARDEN VILLA		
RENTAL REAL ESTATE INCOME OR LOSS	-70.	
REGULAR INCOME OR LOSS BEFORE LIMITATIONS	-70.	-70.
PLUS: POST-86 DEPRECIATION ADJUSTMENT		2.
AMT INCOME OR LOSS BEFORE LIMITATIONS		-68.
ALLOWABLE INCOME OR LOSS	-70.	-68.

SUPPLEMENT TO FORM 6251

LINE 29 - EXEMPTION WORKSHEET

1.	$52,800. IF SINGLE OR HEAD OF HOUSEHOLD $82,100. IF MARRIED FILING JT. OR QUAL. WIDOW(ER) $41,050. IF MARRIED FILING SEPARATELY		82,100.
2.	ALTERNATIVE MINIMUM TAXABLE INCOME, LINE 28	413,643.	
3.	$117,300. IF SINGLE OR HEAD OF HOUSEHOLD $156,500. IF MFJ OR QUAL. WIDOW(ER) $ 78,250. IF MARRIED FILING SEPARATELY	156,500.	
4.	LINE 2 LESS LINE 3	257,143.	
5.	MULTIPLY LINE 4 BY 25%		64,286.
6.	EXEMPTION AMOUNT (LINE 1 LESS LINE 5)		17,814.

SUPPLEMENT TO FORM 6251

LINE 42 - WORKSHEET

1.	AMOUNT FROM FORM 6251, LINE 41	259,671.
2.	LINE 1 MULTIPLIED BY 28%	72,708.
3.	$3,650 OR $1,825 IF MARRIED FILING SEPARATELY	3,650.
4.	TOTAL TO FORM 6251, LINE 42 (LINE 2 LESS LINE 3)	69,058.

LINE 63 - WORKSHEET

1.	AMOUNT FROM FORM 6251, LINE 36	395,829.
2.	LINE 1 MULTIPLIED BY 28%	110,832.
3.	$3,650 OR $1,825 IF MARRIED FILING SEPARATELY	3,650.
4.	TOTAL TO FORM 6251, LINE 63 (LINE 2 LESS LINE 3)	107,182.

SUPPLEMENT TO SCHEDULE H

	CASH WAGES SUBJECT TO			FEDERAL	ADVANCE
NAME OF EMPLOYEE	SOC. SEC. TAX	MEDICARE TAX	FUTA TAX	INCOME TAX W/H	EIC PAYMENTS
	11,760.	11,760.	7,000.	590.	
	4,240.	4,240.	4,240.	241.	
	4,475.	4,475.	4,475.	283.	
	10,704.	10,704.	7,000.	1,245.	
	1,153.	1,153.	1,153.	65.	
TOTAL	32,332.	32,332.	23,868.	2,424.	

SUPPLEMENT TO FORM 4952

DETAIL OF INVESTMENT INTEREST EXPENSE

	CURRENT YEAR	PRIOR YEAR
DESCRIPTION	INV. INT.	DISALLOWED INV. INT.
L.A. & C - CITLO I - THE COLLECTORS	7,944.	
L.A. & C - CITLO I - DERNS MARKET O	394.	
L.A. & C - CITLO I - MALTA HEDGE	4,203.	
L.A. & C. LIMITED PARTNERSHIP	126.	
L.A.& C- CITLO V- SOUTHOCEAN	19.	
TOTAL INVESTMENT INTEREST EXPENSE	12,686.	

SUPPLEMENT TO FORM 4952

GAIN FROM INVESTMENT PROPERTIES

	ORDINARY	SHORT TERM		LONG TERM	
	GAIN	LOSS	GAIN	LOSS	GAIN
CAP. GAIN DIST					612.
SCHEDULE D		60,693.	496.	9,823.	129,851.
TOTAL		60,693.	496.	9,823.	130,463.

NET GAIN - PROPERTY HELD FOR INVESTMENT - FORM 4952 LINE 4D	60,443.

ELECTION TO INCLUDE QUAL.DIV.& NET CAP.GAIN AS INV.INCOME

GROSS INCOME EXCLUDING QUAL. DIV. - FORM 4952 LINE 4C	42,844.	
ORDINARY GAIN - PROPERTY HELD FOR INVESTMENT		
TOTAL INCOME BEFORE CAPITAL GAIN		42,844.
TOTAL INVESTMENT INTEREST EXPENSES - FORM 4952 LN. 3	12,686.	
INVESTMENT EXPENSES - FORM 4952 LINE 5	11,353.	
TOTAL EXPENSES		24,039.
EXCESS TOTAL EXPENSES OVER TOTAL INCOME		NONE
QUALIFIED DIVIDENDS		75,715.
NET LONG-TERM CAPITAL GAIN - INVESTMENT PROPERTY	120,640.	
NET SHORT-TERM CAPITAL LOSS - INVESTMENT PROPERTY	60,197.	
NET CAPITAL GAIN		60,443.
NET CAPITAL GAIN YOU MAY ELECT TO REPORT AS ORDINARY		NONE
QUALIFIED DIVIDENDS YOU MAY ELECT TO INCLUDE IN INV. INC.		NONE

CONTINUED...

SUPPLEMENT TO FORM 4952

ELECTION TO INCLUDE QUAL.DIV.& NET CAP.GAIN AS INV.INCOME (CONT'D)

NET CAPITAL GAIN ELECTED TO BE REPORTED AS ORDINARY	NONE
QUALIFIED DIVIDENDS ELECTED TO BE INCLUDED IN INV. INC.	NONE
TOTAL ELECTION TO BE INCLUDED IN INVESTMENT INCOME - FORM 4952 LINE 4G	NONE

SUPPLEMENT TO FORM 4952

DETAIL OF INVESTMENT INCOME MINUS EXPENSES

1. CHILD'S INCOME FROM FORM 8814		
2. INTEREST INCOME	485.	
3. DIVIDEND INCOME	16,598.	
4. ANNUITIES		
5. ROYALTY INCOME		
6. K-1 SOURCES INVESTMENT INCOME	101,476.	
7. GROSS INVESTMENT INCOME		118,559.
8. QUALIFIED DIVIDENDS		75,715.
9. GROSS INVESTMENT INCOME EXCLUDING QUALIFIED DIV.		42,844.
10. ORDINARY SECTION 1245, 1250 & 1254 INCOME		
11. NET CAPITAL GAIN FROM INVESTMENT PROPERTY	60,443.	
12. NET GAIN FROM INVESTMENT PROPERTY	60,443.	
13. LINE 12 LESS LINE 11		
14. INVESTMENT INCOME ELECTION		NONE
15. TOTAL INVESTMENT INCOME		42,844.
16. ROYALTY EXPENSES		
17. INVESTMENT EXPENSES	11,353.	
18. TOTAL INVESTMENT EXPENSES		11,353.
19. TOTAL NET INVESTMENT INCOME		31,491.

SUPPLEMENT TO FORM 8960

PART II INVESTMENT EXPENSES ALLOCABLE TO INVESTMENT INCOME AND MODIFICATIONS

LINE 9A INVESTMENT INTEREST EXPENSES

1. SCHEDULE A (FORM 1040), LINE 14	12,686.
2. ADJUSTMENT FROM ORGANIZER	
3. TOTAL. ADD LINE 1 AND LINE 2	12,686.

SUPPLEMENT TO FORM 8960

PART II INVESTMENT EXPENSES ALLOCABLE TO INVESTMENT INCOME AND MODIFICATIONS

LINE 9C MISCELLANEOUS INVESTMENT EXPENSES

1. AMOUNT OF MISCELLANEOUS ITEMIZED DEDUCTIONS BEFORE THE APPLICATION OF SECTION 67 LIMITATION	19,898.
2. AMOUNT OF ALL MISCELLANEOUS ITEMIZED DEDUCTIONS AFTER THE APPLICATION OF SECTION 67 LIMITATION (SCHEDULE A (FORM 1040), LINE 27)	11,353.
3. SMALLER OF LINE 1 OR LINE 2	11,353.
4. DIVIDE LINE 2 BY LINE 1	0.57055986
5. FORM 4952 LINE 5 RECALCULATED FOR NII BEFORE SECTION 67 LIMITATION	19,898.
6. MULTIPLY LINE 4 TIMES LINE 5	11,353.
7. FORM 4952 LINE 5 RECALCULATED FOR NII AFTER APPLICATION OF SECTION 67 LIMITATION AND SUBJECT TO THE SECTION 68 LIMITATION	11,353.
8. TOTAL DEDUCTIONS PROPERLY ALLOCABLE TO INVESTMENT INCOME SUBJECT TO THE SECTION 68 LIMITATION	11,353.
9. ITEMIZED DEDUCTION LIMITATION FOR NII	28,282.
10. SMALLER OF LINE 8 OR LINE 9	11,353.
11. DIVIDE LINE 10 BY LINE 8	1.00000000
12. MULTIPLY LINE 7 TIMES LINE 11	11,353.
13. ADJUSTMENT FROM ORGANIZER	
14. MISCELLANEOUS INVESTMENT EXPENSES FOR NII AFTER APPLICATION OF SECTION 67 AND SECTION 68 LIMITATIONS. ADD LINE 12 AND LINE 13	11,353.

SUPPLEMENT TO FORM 8960

PART III TAX COMPUTATION
LINE 13 MODIFIED ADJUSTED GROSS INCOME

1. ENTER YOUR ADJUSTED GROSS INCOME	427,509.
2. FOREIGN EARNED INCOME EXCLUSION:	
(A) ENTER YOUR FOREIGN EARNED INCOME EXCLUSION (FROM LINE 42 OF FORM 2555)	
(B) ENTER THE DEDUCTIONS REPORTED ON LINE 44 OF FORM 2555 ALLOCABLE TO YOUR FOREIGN EARNED INCOME EXCLUSION	
(C) COMBINE LINES 2(A) AND 2(B)	
3. ADJUSTMENTS FOR CERTAIN CFCS AND CERTAIN PFICS	
4. ENTER THE SUM OF LINE 1, LINE 2(C), AND LINE 3. (ENTER THIS AMOUNT ON FORM 8960, LINE 13.)	427,509.

SUPPLEMENT TO 8582 WORKSHEET 3

WORKSHEET 3 - FOR FORM 8582, LINE 3A, 3B, AND 3C

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEARS	OVERALL GAIN OR LOSS	
	(A)NET INCOME	(B)NET LOSS	(C)UNALLOWED LOSS	(D)GAIN	(E)LOSS
L.A. & C - CITLO I STUZIN I STUZIN QU					
L.A. & C - CITLO IV					
L.A. & C - CITLO VI					
L.A. & C - CITLO II					
L.A. & C - CITLO V					
L.A. & C - LEXINGTO	1,958.		74,466.		72,508.
L.A. & C - CSF HOLD					
L.A. & C - CITLO I		5,048.	10,874.		15,922.
L.A. & C - CITLO I	236.			236.	
L.A. & C - CITLO I	6.		323.		317.
L.A. & C - CITLO I	21,679.			21,679.	
L.A. & C - CITLO IV	2,650.		8,148.		5,498.
L.A. & C - CITLO VI	119.			119.	
L.A. & C - CITLO II		282.	3,977.		4,259.
2KAS PARTNERS LLC	44,297.	1,139.		43,158.	
3KAS PARTNERS LLC	2,190.			2,190.	
4KAS PARTNERS LLC	5,624.			5,624.	
KAS GOLD LLC		5,464.			5,464.
KAS AIRPORT LLC		5,800.			5,800.
L.A. & C - CITLO II		72.	90.		162.
L.A. & C - CITLO II			4.		4.
L.A. & C - CITLO II	3.		13.		10.
L.A. & C - CITLO II					
L.A. & C - CITLO II	15.			15.	
L.A. & C PARTNERSH			161.		161.
6 KAS PARTNERS, LLC	20,012.			20,012.	
KAS POMPANO BEACH,	4,491.			4,491.	
KAS DATURA, LLC			2,827.		2,827.
L.A. & C - CITLO II					
L.A. & C - CITLO II	6,069.	2,148.	41.	3,880.	
L.A. & C - SOAM TAR					
L.A. & C - CITLO IV		2,329.	1,234.		3,563.
L.A. & C - CITLO IV			613.		613.
L.A. & C. LIMITED P	252.	18.	353.		119.
KAS CENTRAL	1,820.		5,744.		3,924.
KAS GROVE	27,082.			27,082.	
5KAS PARTNERS	42.			42.	
L.A. & C. - CITLO I					
L.A. & C. - CITLO V	140.		127.	13.	

SUPPLEMENT TO 8582 WORKSHEET 3

WORKSHEET 3 - FOR FORM 8582, LINE 3A, 3B, AND 3C

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEARS	OVERALL GAIN OR LOSS	
	(A)NET INCOME	(B)NET LOSS	(C)UNALLOWED LOSS	(D)GAIN	(E)LOSS
L.A.&C.- CITLO II-					
L.A.& C. - CITLO II					
L.A. & C. - CITLO V	246.		1,610.		1,364.
KAS WINKLER	3,751.			3,751.	
L.A. & C. - CITLO V	75.			75.	
L.A.& C- CITLO V- S		3.			3.
L.A.& C- CITLO V- P	3.			3.	
L.A.& C- CITLO V- P		70.			70.
L.A.& C- CITLO V- P		2.			2.
L.A.& C- CITLO V- T	21.			21.	
L.A.& C- CITLO V- S		100.			100.
L.A. & C - UNITED S					
TOTAL	142,781.	22,475.	110,605.		

SUPPLEMENT TO 8582 WORKSHEET 5

WORKSHEET 5 - ALLOCATION OF UNALLOWED LOSSES

	FORM OR SCH.	(A) LOSS	(B)RATIO	(C)UNALLOWED LOSS
L.A. & C - LEXINGTO	SCH E, 28	72,508.	0.59098541	
L.A. & C - CITLO I	SCH E, 28	15,922.	0.12977423	
L.A. & C - CITLO I	SCH E, 28	317.	0.00258375	
L.A. & C - CITLO IV	SCH E, 28	5,498.	0.04481213	
L.A. & C - CITLO II	SCH E, 28	4,259.	0.03471351	
KAS GOLD LLC	SCH E, 28	5,464.	0.04453501	
KAS AIRPORT LLC	SCH E, 28	5,800.	0.04727362	
L.A. & C - CITLO II	SCH E, 28	162.	0.00132040	
L.A. & C - CITLO II	SCH E, 28	4.	0.00003260	
L.A. & C - CITLO II	SCH E, 28	10.	0.00008151	
L.A. & C PARTNERSH	SCH E, 28	161.	0.00131225	
KAS DATURA, LLC	SCH E, 28	2,827.	0.02304181	
L.A. & C - CITLO IV	SCH E, 28	3,563.	0.02904067	
L.A. & C - CITLO IV	SCH E, 28	613.	0.00499633	
L.A. & C. LIMITED P	SCH E, 28	119.	0.00096992	
KAS CENTRAL	SCH E, 28	3,924.	0.03198305	
L.A. & C. - CITLO V	SCH E, 28	1,364.	0.01111745	
L.A.& C- CITLO V- S	SCH E, 28	3.	0.00002445	
L.A.& C- CITLO V- P	SCH E, 28	70.	0.00057054	
L.A.& C- CITLO V- P	SCH E, 28	2.	0.00001630	
L.A.& C- CITLO V- S	SCH E, 28	100.	0.00081506	
TOTAL		122,690.	1.0000000	

SUPPLEMENT TO 8582 WORKSHEET 6

WORKSHEET 6 - ALLOWED LOSSES

	FORM OR SCHEDULE	(A) LOSS	(B) UNALLOWED LOSS	(C) ALLOWED LOSS
L.A. & C - LEXINGTON HI	SCH E, 28	74,466.		74,466.
L.A. & C - CITLO I - THE	SCH E, 28	15,922.		15,922.
L.A. & C - CITLO I - MAL	SCH E, 28	323.		323.
L.A. & C - CITLO IV - GC	SCH E, 28	8,148.		8,148.
L.A. & C - CITLO II - CM	SCH E, 28	4,259.		4,259.
KAS GOLD LLC	SCH E, 28	5,464.		5,464.
KAS AIRPORT LLC	SCH E, 28	5,800.		5,800.
L.A. & C - CITLO II - BR	SCH E, 28	162.		162.
L.A. & C - CITLO II - CA	SCH E, 28			
L.A. & C - CITLO II - SO	SCH E, 28	13.		13.
L.A. & C PARTNERSHIP	SCH E, 28			
KAS DATURA, LLC	SCH E, 28	2,827.		2,827.
L.A. & C - CITLO IV - GC	SCH E, 28	3,563.		3,563.
L.A. & C - CITLO IV - GC	SCH E, 28	613.		613.
KAS CENTRAL	SCH E, 28	5,744.		5,744.
L.A. & C. - CITLO VI - G	SCH E, 28	1,610.		1,610.
L.A.& C- CITLO V- SAN AN	SCH E, 28	3.		3.
L.A.& C- CITLO V- PSREG	SCH E, 28	70.		70.
L.A.& C- CITLO V- PSREG	SCH E, 28	2.		2.
L.A.& C- CITLO V- SOUTHO	SCH E, 28	100.		100.
TOTAL		129,089.		129,089.

STATEMENT 64

LAURA ANNE STUZIN & DANIEL J BERNSTEIN
[illegible]

SUPPLEMENT TO 8582 WORKSHEET 7

WORKSHEET 7 - ACTIVITIES WITH LOSSES REPORTED ON TWO OR MORE FORMS

NAME OF ACTIVITY	FORM OR SCHEDULE	PRELIMINARY AMOUNTS (1A) LOSS	(1B) INCOME	(B)	(C) RATIO	(D) UNALLOWED LOSS	(E) ALLOWE LOSS
L.A. & C. LIMITED PARTNER	SCH E, 28	167.		167.	1.00000000		16
	FORM 4797	204.	252.				20
		371.	252.	167.	1.00000000		37
TOTAL		371.	252.	167.	1.00000000		37

Form **4868**

Department of the Treasury
Internal Revenue Service (99)

Application for Automatic Extension of Time To File U.S. Individual Income Tax Return

▶ Information about Form 4868 and its instructions is available at *www.irs.gov/form4868.*

OMB No. 1545-0074

2015

There are three ways to request an automatic extension of time to file a U.S. individual income tax return.

1. You can pay all or part of your estimated income tax due and indicate that the payment is for an extension using Direct Pay, the Electronic Federal Tax Payment System, or using a credit or debit card. See *How To Make a Payment*, on page 3.
2. You can file Form 4868 electronically by accessing IRS *e-file* using your home computer or by using a tax professional who uses *e-file*.
3. You can file a paper Form 4868 and enclose payment of your estimate of tax due.

IRS e - file

It's Convenient, Safe, and Secure

IRS *e-file* is the IRS's electronic filing program. You can get an automatic extension of time to file your tax return by filing Form 4868 electronically. You will receive an electronic acknowledgment once you complete the transaction. Keep it with your records. Do not mail in Form 4868 if you file electronically, unless you are making a payment with a check or money order (see page 3).

Complete Form 4868 to use as a worksheet. If you think you may owe tax when you file your return, you will need to estimate your total tax liability and subtract how much you have already paid (lines 4, 5, and 6 below).

Several companies offer free e-filing of Form 4868 through the Free File program. For more details, go to IRS.gov and click on *freefile*.

Pay Electronically

You **do not** need to file Form 4868 if you make a payment using our electronic payment options. Your extension will be automatically processed when you pay part or all of your estimated income tax electronically. You can pay online or by phone (see page 3).

E-file Using Your Personal Computer or Through a Tax Professional

Refer to your tax software package or tax preparer for ways to file electronically. Be sure to have a copy of your 2014 tax return - you will be asked to provide information from the return for taxpayer verification. If you wish to make a payment, you can pay by electronic funds withdrawal or send your check or money order to the address shown in the middle column under *Where To File a Paper Form 4868* (see page 4).

File a Paper Form 4868

If you wish to file on paper instead of electronically, fill in the Form 4868 below and mail it to the address shown on page 4.

For information on using a private delivery service, see page 4.

Note: If you are a fiscal year taxpayer, you must file a paper Form 4868.

General Instructions

Purpose of Form

Use Form 4868 to apply for 6 more months (4 if "out of the country" (defined on page 2) and a U.S. citizen or resident) to file Form 1040, 1040A, 1040EZ, 1040NR, 1040NR-EZ, 1040-PR, or 1040-SS.

Gift and generation-skipping transfer (GST) tax return (Form 709). An extension of time to file your 2015 calendar year income tax return also extends the time to file Form 709 for 2015. However, it does not extend the time to pay any gift and GST tax you may owe for 2015. To make a payment of gift and GST tax, see Form 8892. If you do not pay the amount due by the regular due date for Form 709, you will owe interest and may also be charged penalties. If the donor died during 2015, see the instructions for Forms 709 and 8892.

Qualifying for the Extension

To get the extra time you must:

1. Properly estimate your 2015 tax liability using the information available to you,
2. Enter your total tax liability on line 4 of Form 4868, and
3. File Form 4868 by the regular due date of your return.

! CAUTION *Although you are not required to make a payment of the tax you estimate as due, Form 4868 does not extend the time to pay taxes. If you do not pay the amount due by the regular due date, you will owe interest. You may also be charged penalties. For more details, see* Interest *and* Late Payment Penalty *on page 2. Any remittance you make with your application for extension will be treated as a payment of tax.*

You do not have to explain why you are asking for the extension. We will contact you only if your request is denied.

Do not file Form 4868 if you want the IRS to figure your tax or you are under a court order to file your return by the regular due date.

▼ DETACH HERE ▼

Form **4868**

Department of the Treasury
Internal Revenue Service (99)

Application for Automatic Extension of Time To File U.S. Individual Income Tax Return

For calendar year 2015, or other tax year beginning , 2015, ending , 20

OMB No. 1545-0074

2015

Part I Identification

1 Your name(s) (see instructions)

LAURA ANNE STUZIN
DANIEL J BERNSTEIN

Address (see instructions)

[redacted]

City, town, or post office | State | ZIP Code

[redacted]

2 Your social security number

[redacted]

3 Spouse's social security number

Part II Individual Income Tax

4	Estimate of total tax liability for 2015 . . .	$ 167,981.
5	Total 2015 payments	157,981.
6	**Balance due.** Subtract line 5 from line 4 (see instructions)	10,000.
7	Amount you are paying (see instructions) . ▶	10,000.
8	Check here if you are "out of the country" and a U.S. citizen or resident (see instructions) . . . . ▶	☐
9	Check here if you file Form 1040NR or 1040NR-EZ and did not receive wages as an employee subject to U.S. income tax withholding . . . . ▶	☐

For Privacy Act and Paperwork Reduction Act Notice, see page 4.

Form **4868** (2015)

JSA

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