

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

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

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

SUPERVISOR OF ELECTIONS  
2022 JUN 14 PM 12:09  
PALM BEACH COUNTY

**2021**

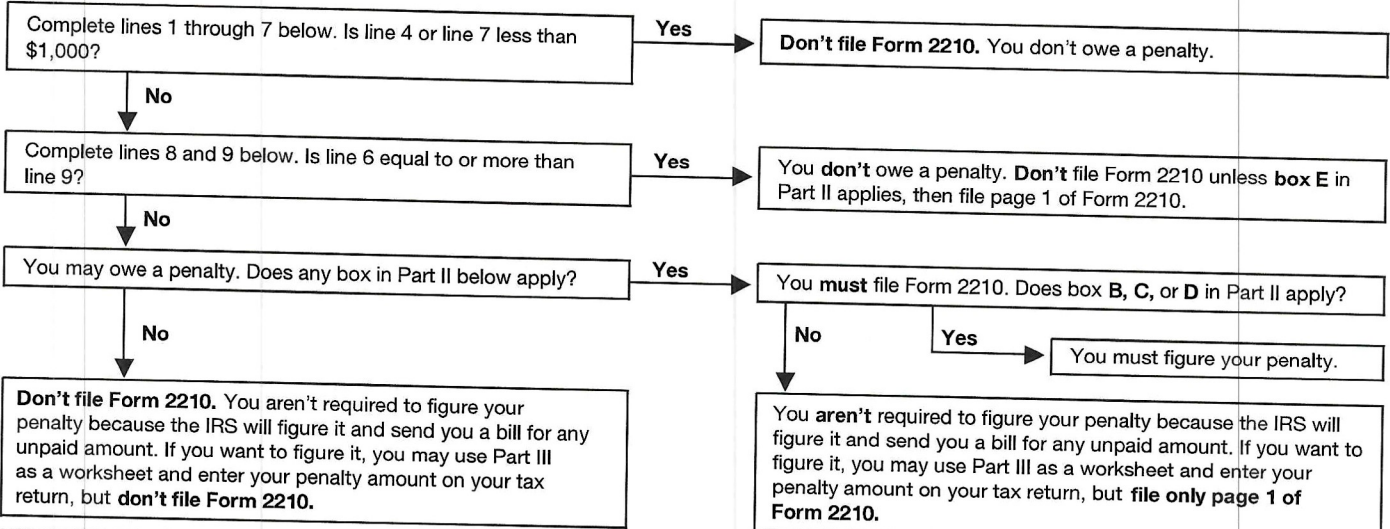
Attachment  
Sequence No. **06**

Name(s) shown on tax return

**GREGG K. & REBECCA M. WEISS**

Identifying number

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



**Part I Required Annual Payment**

1	Enter your 2021 tax after credits from Form 1040, 1040-SR, or 1040-NR, line 22. (See the instructions if not filing Form 1040.)	1	61,142.
2	Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	6,763.
3	Other payments and refundable credits (see instructions)	3	( )
4	Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, <b>stop</b> ; you don't owe a penalty. <b>Don't file Form 2210</b>	4	67,905.
5	Multiply line 4 by 90% (0.90)	5	61,115.
6	Withholding taxes. <b>Don't</b> include estimated tax payments. See instructions	6	21,678.
7	Subtract line 6 from line 4. If less than \$1,000, <b>stop</b> ; you don't owe a penalty. <b>Don't file Form 2210</b>	7	46,227.
8	Maximum required annual payment based on prior year's tax (see instructions)	8	47,414.
9	<b>Required annual payment.</b> Enter the <b>smaller</b> of line 5 or line 8	9	47,414.

**Next:** Is line 9 more than line 6?

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

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

- A  You request a **waiver** (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you aren't required to figure your penalty.
- B  You request a **waiver** (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C  Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D  Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E  You filed or are filing a joint return for either 2020 or 2021, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you **aren't** required to figure your penalty (unless box B, C, or D applies).

LHA For Paperwork Reduction Act Notice, see separate instructions.

**Part III Penalty Computation** (See the instructions if you're filing Form 1040-NR.)

**Section A - Figure Your Underpayment**

**Payment Due Dates**

	(a) 4/15/21	(b) 6/15/21	(c) 9/15/21	(d) 1/15/22	
<b>10 Required installments.</b> If box C in Part II applies, enter the amounts from Schedule AI, line 27. Otherwise, enter 25% (0.25) of line 9, Form 2210, in each column. For fiscal year filers, see instructions	10	11,854.	11,854.	11,854.	11,852.
<b>11 Estimated tax paid and tax withheld</b> (see the instructions). For column (a) only, also enter the amount from line 11 on line 15, column (a). If line 11 is equal to or more than line 10 for all payment periods, stop here; you don't owe a penalty. <b>Don't file Form 2210 unless you checked a box in Part II</b>	11	5,420.	5,420.	5,420.	5,418.

Complete lines 12 through 18 of one column before going to line 12 of the next column.

<b>12</b> Enter the amount, if any, from line 18 in the previous column	12				
<b>13</b> Add lines 11 and 12	13		5,420.	5,420.	5,418.
<b>14</b> Add the amounts on lines 16 and 17 in the previous column	14		6,434.	12,868.	19,302.
<b>15</b> Subtract line 14 from line 13. If zero or less, enter -0-. For column (a) only, enter the amount from line 11	15	5,420.	0.	0.	0.
<b>16</b> If line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-	16		1,014.	7,448.	
<b>17 Underpayment.</b> If line 10 is equal to or more than line 15, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18	17	6,434.	11,854.	11,854.	11,852.
<b>18</b> Overpayment. If line 15 is more than line 10, subtract line 10 from line 15. Then go to line 12 of the next column	18				

**Section B - Figure the Penalty** (Use the Worksheet for Form 2210, Part III, Section B - Figure the Penalty in the instructions.)

<b>19 Penalty.</b> Enter the total penalty from line 14 of the Worksheet for Form 2210, Part III, Section B - Figure the Penalty. Also include this amount on Form 1040, 1040-SR, or 1040-NR, line 38; or Form 1041, line 27. <b>Don't file Form 2210 unless you checked a box in Part II</b>	19				513.
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SEE ATTACHED WORKSHEET

**UNDERPAYMENT OF ESTIMATED TAX WORKSHEET**

SUPERVISOR OF ELECTIONS

2021 JUN 14 PM 12:59

Name(s) <b>GREGG K. &amp; REBECCA M. WEISS</b>					
(A) *Date	(B) Amount	(C) Adjusted Balance Due	(D) Number Days Balance Due	(E) Daily Penalty Rate	(F) Penalty
		-0-			
04/15/21	11,854.	11,854.			
04/15/21	-5,420.	6,434.	61	.000082192	32.
06/15/21	11,854.	18,288.			
06/15/21	-5,420.	12,868.	92	.000082192	97.
09/15/21	11,854.	24,722.			
09/15/21	-5,420.	19,302.	122	.000082192	194.
01/15/22	11,852.	31,154.			
01/15/22	-5,418.	25,736.	90	.000082192	190.
Penalty Due (Sum of Column F) .....					<b>513.</b>

\* Date of estimated tax payment, withholding credit date or installment due date.

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

**Itemized Deductions**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service (99)

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

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

SUPERVISOR  
2021  
Attachment Sequence No. 07  
Your social security number  
PALM BEACH

**GREGG K. & REBECCA M. WEISS**

**Medical and Dental Expenses**

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

1	Medical and dental expenses (see instructions)	1	
2	Enter amount from Form 1040 or 1040-SR, line 11	2	
3	Multiply line 2 by 7.5% (0.075)	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 taxes.		
a	State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box <b>SEE STATEMENT 5</b> ▶ <input type="checkbox"/>	5a	2,640.
b	State and local real estate taxes (see instructions)	5b	7,612.
c	State and local personal property taxes	5c	
d	Add lines 5a through 5c	5d	10,252.
e	Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)	5e	10,000.
6	Other taxes. List type and amount ▶	6	
7	Add lines 5e and 6	7	10,000.

**Interest You Paid**

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

8	Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box <input type="checkbox"/>		
a	Home mortgage interest and points reported to you on Form 1098. See instructions if limited	8a	7,308.
b	Home mortgage interest not reported to you on Form 1098. See instructions if limited. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address ▶	8b	
c	Points not reported to you on Form 1098. See instructions for special rules	8c	
d	Mortgage insurance premiums (see instructions)	8d	
e	Add lines 8a through 8d	8e	7,308.
9	Investment interest. Attach Form 4952 if required. See instructions	9	
10	Add lines 8e and 9	10	7,308.

**Gifts to Charity**

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

11	Gifts by cash or check. If you made any gift of \$250 or more, see instructions	11	11,982.
12	Other than by cash or check. If you made any gift of \$250 or more, see instructions. You <b>must</b> attach Form 8283 if over \$500	12	
13	Carryover from prior year	13	
14	Add lines 11 through 13	14	11,982.

**Casualty and Theft Losses**

15	Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions	15	
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**Other Itemized Deductions**

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

17	Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040 or 1040-SR, line 12a	17	29,290.
18	If you elect to itemize deductions even though they are less than your standard deduction, check this box <input type="checkbox"/>		

**SCHEDULE B**

(Form 1040)

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

**Interest and Ordinary Dividends**

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

▶ Attach to Form 1040 or 1040-SR.

OMB No. 1545-0074

SUPERVISOR  
2021  
Attachment  
Sequence No. 08  
Your social security number

**GREGG K. & REBECCA M. WEISS**

**Part I**

**Interest**

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

FREMONT BANK

MERRILL - 6097

MORGAN STANLEY

Amount

235.

17.

1.

1

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

**2** Add the amounts on line 1

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

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

253.

253.

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

**Part II**

**Ordinary Dividends**

**5** List name of payer ▶

MERRILL - 6100

MERRILL - 6105

MERRILL - 6106

MERRILL - 6107

MERRILL - 6108

MERRILL - 6109

MORGAN STANLEY

Amount

19,593.

4,372.

1,576.

1,400.

2,535.

9,192.

7,818.

5

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

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

46,486.

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

**Part III**

**Foreign Accounts and Trusts**

**Caution:** If required, failure to file FinCEN Form 114 may result in substantial penalties. See instructions. 127501 11-04-21

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 2021, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions. If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements

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

**8** During 2021, 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

Yes	No
	X
	X

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

Schedule B (Form 1040) 2021

**SCHEDULE D**

(Form 1040)

Department of the Treasury  
Internal Revenue Service (99)

**Capital Gains and Losses**

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

OMB No. 1545-0074

**2021**

Attachment  
Sequence No. 12

Your social security number

Name(s) shown on return

**GREGG K. & REBECCA M. WEISS**

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.		(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>1a</b>	Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
<b>1b</b>	Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked	118,878.	116,205.	85.	2,758.
<b>2</b>	Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked				
<b>3</b>	Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked				
<b>4</b>	Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
<b>5</b>	Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
<b>6</b>	Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions				6 ( )
<b>7</b>	<b>Net short-term capital gain or (loss).</b> Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2				7 2,758.

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.		(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>8a</b>	Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
<b>8b</b>	Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked	357,092.	243,186.		113,906.
<b>9</b>	Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked	81,461.	33,249.		48,212.
<b>10</b>	Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked				
<b>11</b>	Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
<b>12</b>	Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
<b>13</b>	Capital gain distributions <b>SEE STATEMENT 7</b>				13 54,678.
<b>14</b>	Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions				14 ( )
<b>15</b>	<b>Net long-term capital gain or (loss).</b> Combine lines 8a through 14 in column (h). Then, go to Part III on page 2				15 216,796.

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

Schedule D (Form 1040) 2021

Part III Summary

SUPERVISOR OF ELECTIONS  
2022 JUN 14 PM 1:00  
PALM BEACH COUNTY, FL.  
219,554.

16 Combine lines 7 and 15 and enter the result

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

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

- Yes.** Go to line 18.
- No.** Skip lines 18 through 21, and go to line 22.

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

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

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

- Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Forms 1040 and 1040-SR, line 16. **Don't** complete lines 21 and 22 below.
- No.** Complete the **Schedule D Tax Worksheet** in the instructions. **Don't** complete lines 21 and 22 below.

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

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

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

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

- Yes.** Complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the instructions for Forms 1040 and 1040-SR, line 16.
- No.** Complete the rest of Form 1040, 1040-SR, or 1040-NR.

16  
18  
19  
21

**Sales and Other Dispositions of Capital Assets**

Department of the Treasury  
Internal Revenue Service

Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.  
File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

SUPERVISOR OF ELECTIONS

**2021**

Attachment Sequence No. **12A**

Name(s) shown on return

Social security number or taxpayer identification no.

**GREGG K. & REBECCA M. WEISS**

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the <b>Note</b> below and see <i>Column (e)</i> in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions.		(h) Gain or (loss). Subtract column (e) from column (d) & combine the result with column (g)
						(f) Code(s)	(g) Amount of adjustment	
	MERRILL-6100			3,440.	3,263.			177.
	MERRILL-6105			9,385.	7,283.			2,102.
	MERRILL-6106			16,805.	17,864.			<1,059.>
	MERRILL-6107			10,291.	11,699.	W	85.	<1,323.>
	MERRILL-6108			44,654.	40,823.			3,831.
	MERRILL-6109			34,303.	35,273.			<970.>

**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) **►** **118,878.** **116,205.** **85.** **2,758.**

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



Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on page 1

Social security number or taxpayer identification no.

GREGG K. & REBECCA M. WEISS

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

Part II Long-Term.

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

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

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box.

If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

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

[ ] (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

[ ] (F) Long-term transactions not reported to you on Form 1099-B

Table with 7 main columns: (a) Description of property, (b) Date acquired, (c) Date sold or disposed of, (d) Proceeds (sales price), (e) Cost or other basis, (f) Adjustment Code(s), (g) Amount of adjustment, (h) Gain or (loss). Rows include MERRILL-6100 through MERRILL-6109.

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)

357,092. 243,186. 113,906.

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

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on page 1

Social security number or taxpayer identification no.

2022 JUN 14

**GREGG K. & REBECCA M. WEISS**

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the <b>Note</b> below and see <i>Column (e)</i> in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). <b>See instructions.</b>		(h) <b>Gain or (loss).</b> Subtract column (e) from column (d) & combine the result with column (g)
						(f) Code(s)	(g) Amount of adjustment	
	MERRILL-6100			80,821.	33,128.			47,693.
	MERRILL-6105			640.	121.			519.
<b>2 Totals.</b> 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) ▶								
				81,461.	33,249.			48,212.

**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.

**Qualified Dividends and Capital Gain Tax Worksheet - Line 16**

SUPERVISOR OF ELECTIONS *Keep for Your Records*

Name(s) shown on return  
**GREGG K. & REBECCA M. WEISS**

2022 JUN 14 PM 1:00

Your SSN [REDACTED]

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

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	<u>398,549.</u>	
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	<u>35,342.</u>	
3. Are you filing Schedule D?*			
<input checked="" type="checkbox"/> <b>Yes.</b> Enter the <b>smaller</b> of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or a loss, enter -0-.	}	3.	<u>216,796.</u>
<input type="checkbox"/> <b>No.</b> Enter the amount from Form 1040 or 1040-SR, line 7.			
4. Add lines 2 and 3	4.	<u>252,138.</u>	
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	<u>146,411.</u>	
6. Enter: \$ 40,400 if single or married filing separately, \$ 80,800 if married filing jointly or qualifying widow(er), \$ 54,100 if head of household.	}	6.	<u>80,800.</u>
7. Enter the smaller of line 1 or line 6	7.	<u>80,800.</u>	
8. Enter the smaller of line 5 or line 7	8.	<u>80,800.</u>	
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	<u>0.</u>	
10. Enter the smaller of line 1 or line 4	10.	<u>252,138.</u>	
11. Enter the amount from line 9	11.	<u>0.</u>	
12. Subtract line 11 from line 10	12.	<u>252,138.</u>	
13. Enter: \$ 445,850 if single, \$ 250,800 if married filing separately, \$ 501,600 if married filing jointly or qualifying widow(er), \$ 473,750 if head of household.	}	13.	<u>501,600.</u>
14. Enter the smaller of line 1 or line 13	14.	<u>398,549.</u>	
15. Add lines 5 and 9	15.	<u>146,411.</u>	
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	<u>252,138.</u>	
17. Enter the smaller of line 12 or line 16	17.	<u>252,138.</u>	
18. Multiply line 17 by 15% (0.15)	18.	<u>37,821.</u>	
19. Add lines 9 and 17	19.	<u>252,138.</u>	
20. Subtract line 19 from line 10	20.	<u>0.</u>	
21. Multiply line 20 by 20% (0.20)	21.	<u>0.</u>	
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	<u>23,707.</u>	
23. Add lines 18, 21, and 22	23.	<u>61,528.</u>	
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	<u>89,190.</u>	
25. <b>Tax on all taxable income.</b> Enter the <b>smaller</b> of line 23 or 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	<u>61,528.</u>	

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

**SCHEDULE E**  
**(Form 1040)**

**Supplemental Income and Loss**

OMB No. 1545-0074

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

Department of the Treasury  
Internal Revenue Service (99)

Attach to Form 1040, 1040-SR, 1040-NR, or 1041-ELECTIONS

**2021**  
Attachment  
Sequence No. **13**

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

Name(s) shown on return

2022 JUN 14 PM 1:00  
Your social security number

**GREGG K. & REBECCA M. WEISS**

**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. 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 2021 that would require you to file Form(s) 1099? See instructions  Yes  No  
**B** If "Yes," did you or will you file required Form(s) 1099?  Yes  No

**1a** Physical address of each property (street, city, state, ZIP code)  
**A** 221 35TH STREET UNIT B, NEWPORT BEACH, CA 92663  
**B** 721 KANUGA DRIVE, WEST PALM BEACH, FL 33401  
**C**

1b	Type of Property (from list below)	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	A	B	C	A	B	C
A	1		365								
B	1		365								
C											

**Type of Property:**

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

Income:	Properties:	A	B	C
<b>3</b> Rents received	<b>3</b>	97,580.	28,050.	
<b>4</b> Royalties received	<b>4</b>			
<b>Expenses:</b>				
<b>5</b> Advertising	<b>5</b>			
<b>6</b> Auto and travel (see instructions)	<b>6</b>			
<b>7</b> Cleaning and maintenance	<b>7</b>	190.		
<b>8</b> Commissions	<b>8</b>			
<b>9</b> Insurance	<b>9</b>		4,150.	
<b>10</b> Legal and other professional fees	<b>10</b>			
<b>11</b> Management fees	<b>11</b>	7,821.		
<b>12</b> Mortgage interest paid to banks, etc. (see instructions)	<b>12</b>	24,514.	6,108.	
<b>13</b> Other interest	<b>13</b>			
<b>14</b> Repairs	<b>14</b>	468.	310.	
<b>15</b> Supplies	<b>15</b>			
<b>16</b> Taxes	<b>16</b>	23,518.	9,734.	
<b>17</b> Utilities	<b>17</b>	1,069.		
<b>18</b> Depreciation expense or depletion	<b>18</b>	5,172.	8,310.	
<b>19</b> Other (list) <b>STMT 8</b>	<b>19</b>		4,040.	
<b>20</b> Total expenses. Add lines 5 through 19	<b>20</b>	62,752.	32,652.	
<b>21</b> 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	<b>21</b>	34,828.	-4,602.	
<b>22</b> Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	<b>22</b>		4,602.	
<b>23a</b> Total of all amounts reported on line 3 for all rental properties	<b>23a</b>		125,630.	
<b>b</b> Total of all amounts reported on line 4 for all royalty properties	<b>23b</b>			
<b>c</b> Total of all amounts reported on line 12 for all properties	<b>23c</b>		30,622.	
<b>d</b> Total of all amounts reported on line 18 for all properties	<b>23d</b>		13,482.	
<b>e</b> Total of all amounts reported on line 20 for all properties	<b>23e</b>		95,404.	
<b>24</b> <b>Income.</b> Add positive amounts shown on line 21. Do not include any losses	<b>24</b>			34,828.
<b>25</b> <b>Losses.</b> Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	<b>25</b>			4,602.
<b>26</b> <b>Total rental real estate and royalty income or (loss).</b> 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 Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2	<b>26</b>			30,226.

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

Schedule E (Form 1040) 2021

2021 DEPRECIATION AND AMORTIZATION REPORT

221 35TH STREET UNIT A & B - 221 35TH

SCHEDULE E-1

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	BUILDING - 428 FERNLEAF (1031 EXCHANGE) UNIT A	01/01/01	SL	27.50	MM	17	45,625.				45,625.	33,113.		1,659.	34,772.
2	LAND - 428 FERNLEAF (1031 EXCHANGE) UNIT A	01/01/01	L				136,875.				136,875.			0.	0.
3	BUILDING ADDL COST OF REPLACEMENT PROPERTY UNIT A	08/21/19	SL	27.50	MM	17	7,500.				7,500.	375.		273.	648.
4	LAND ADDITIONAL COST OF REPLACEMENT PROPERTY UNIT A	08/21/19	L				30,000.				30,000.			0.	0.
5	BUILDING - BOOT RECEIVED UNIT A	08/21/19	SL	27.50	MM	17	17,995.				17,995.	899.		654.	1,553.
6	LAND - BOOT RECEIVED UNIT A	08/21/19	L				71,983.				71,983.			0.	0.
7	BUILDING - 428 FERNLEAF (1031 EXCHANGE) UNIT B	01/01/01	SL	27.50	MM	17	45,625.				45,625.	33,114.		1,659.	34,773.
8	LAND - 428 FERNLEAF (1031 EXCHANGE) UNIT B	01/01/01	L				136,875.				136,875.			0.	0.
9	BUILDING ADDL COST OF REPLACEMENT PROPERTY UNIT B	08/21/19	SL	27.50	MM	17	7,500.				7,500.	375.		273.	648.
10	LAND ADDITIONAL COST OF REPLACEMENT PROPERTY UNIT B	08/21/19	L				30,000.				30,000.			0.	0.
11	BUILDING - BOOT RECEIVED UNIT B	08/21/19	SL	27.50	MM	17	17,995.				17,995.	899.		654.	1,553.
12	LAND - BOOT RECEIVED UNIT B	08/21/19	L				71,983.				71,983.			0.	0.
	TOTAL SCH E DEPRECIATION						619,956.				619,956.	68,775.		5,172.	73,947.

SUPERVISOR OF ELECTIONS  
2022 JUN 14 PM 1:01  
PALM BEACH COUNTY, FL.

128111 04-01-21

(D) - Asset disposed

\* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2021 DEPRECIATION AND AMORTIZATION REPORT

721 KANUGA DRIVE - 721 KANUGA DRIVE, W

SCHEDULE E-2

SUPERVISOR OF ELECTIONS

Asset No.	Description	Date Acquired	Method	Life	C o n v	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Expense (See 179)	Current Year Deduction	Ending Accumulated Depreciation
18	BUILDING - 721 KANUGA DRIVE	03/03/15	SL	27.50	MM	17	228,528.				228,528.	48,125.		8,310.	56,435.
19	LAND - 721 KANUGA DRIVE	03/03/15	L				97,941.				97,941.	0.		0.	0.
	TOTAL SCH E DEPRECIATION						326,469.				326,469.	48,125.		8,310.	56,435.

128111 04-01-21

(D) - Asset disposed

\* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

**Foreign Tax Credit**

(Individual, Estate, or Trust)

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

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

Name

Identifying number as shown on page 1 of your tax return

**GREGG K. & REBECCA M. WEISS**

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

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

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

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

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

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
i Enter the name of the foreign country or U.S. possession ▶ <b>OC</b>				
1a Gross income from sources within country shown above and of the type checked above:	<b>3,984.</b>			<b>3,984.</b>
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source. See instructions ▶ <input type="checkbox"/>				
<b>Deductions and losses (Caution: See instructions.):</b>				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction	<b>10,000.</b>			
b Other deductions (attach statement)				
c Add lines 3a and 3b	<b>10,000.</b>			
d Gross foreign source income	<b>3,984.</b>			
e Gross income from all sources	<b>526,722.</b>			
f Divide line 3d by line 3e	<b>.007563762</b>			
g Multiply line 3c by line 3f	<b>76.</b>			
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	<b>76.</b>			<b>76.</b>
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				<b>3,908.</b>

**Part II Foreign Taxes Paid or Accrued**

SEE STATEMENT 9

Country	Credit is claimed for taxes (you must check one) (j) <input checked="" type="checkbox"/> Paid (k) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued							(u) Total foreign taxes paid or accrued (add cols. (q) through (t))			
		In foreign currency				In U.S. dollars						
		(l) Date paid or accrued	(m) Dividends	(n) Rents and royalties	(o) Interest	(p) Other foreign taxes paid or accrued	(q) Dividends	(r) Rents and royalties		(s) Interest	(t) Other foreign taxes paid or accrued	
A	1099 TAX							<b>386.</b>				<b>386.</b>
B												
C												

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

**8 386.**

LHA For Paperwork Reduction Act Notice, see instructions.

**Part III Figuring the Credit**

SUPERVISOR OF ELECTIONS  
386.  
2022 JUN 14 PM 1:01  
BEACH COUNTY, FL

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	386.	
10	Enter the sum of any carryover of foreign taxes (from Schedule B, line 3, column (xiv)) plus any carrybacks to the current tax year (If your income was section 951A category income (box a above Part I), leave line 10 blank.)	10		
11	Add lines 9 and 10	11	386.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		386.
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	3,908.	
16	Adjustments to line 15	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 24. However, if you are filing more than one Form 1116, you must complete line 20.)	17	3,908.	
18	<b>Individuals:</b> Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption <b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18	398,549.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		.00981
20	<b>Individuals:</b> Enter the total of Form 1040, 1040-SR or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 <b>Caution:</b> If you are completing line 20 for separate category g (lump-sum distributions), or, if you file Form 8978, Partner's Additional Reporting Year Tax, see instructions.	20		61,528.
21	Multiply line 20 by line 19 (maximum amount of credit)	21		604.
22	Increase in limitation (section 960(c))	22		
23	Add lines 21 and 22	23		604.
24	Enter the <b>smaller</b> of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV	24		386.

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

25	Credit for taxes on section 951A category income	25		
26	Credit for taxes on foreign branch category income	26		
27	Credit for taxes on passive category income	27		
28	Credit for taxes on general category income	28		
29	Credit for taxes on section 901(j) income	29		
30	Credit for taxes on certain income re-sourced by treaty	30		
31	Credit for taxes on lump-sum distributions	31		
32	Add lines 25 through 31	32		
33	Enter the <b>smaller</b> of line 20 or line 32	33		386.
34	Reduction of credit for international boycott operations	34		
35	Subtract line 34 from line 33. This is your <b>foreign tax credit</b> . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a	35		386.



**SCHEDULE B  
(Form 1116)**

(December 2021)

Department of the Treasury  
Internal Revenue Service

Name

GREGG K. & REBECCA M. WEISS

**Foreign Tax Carryover Reconciliation Schedule**

For calendar year 2021, or other tax year beginning 2022 JUN 14 PM 1:01, and ending 2022 JUN 14 PM 1:01

See separate instructions.

Attach to Form 1116.

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

OMB No. 1545-0121

Identifying number as shown on page 1 of your tax return

Use a separate Schedule B (Form 1116) for each applicable category of income listed below. See instructions. Check only one box on each schedule. Check the box for the same separate category code as that shown on the Form 1116 to which this Schedule B is attached.

- a  Reserved for future use
- b  Foreign branch category income
- c  Passive category income
- d  General category income
- e  Section 901(i) income
- f  Certain income re-sourced by treaty
- g  Lump-sum distributions

h If box e is checked, enter the country code for the sanctioned country. See instructions  
i If box f is checked, enter the country code for the treaty country. See instructions

Foreign Tax Carryover Reconciliation	(i) 10th Preceding Tax Year	(ii) 9th Preceding Tax Year	(iii) 8th Preceding Tax Year	(iv) 7th Preceding Tax Year	(v) 6th Preceding Tax Year	(vi) 5th Preceding Tax Year	(vii) Subtotal (add columns (i) through (vi))
1 Foreign tax carryover from the prior tax year (enter amounts from the appropriate columns of line 6 of the worksheet in the instructions)							
2 Adjustments to line 1 (enter description - see instructions):							
a Carryback adjustment (see instructions)							
b Adjustments for section 905(c) redeterminations (see instructions)							
c							
d							
e							
f							
g							
3 Adjusted foreign tax carryover from prior tax year (combine lines 1 and 2)							
4 Foreign tax carryover used in current tax year (enter as a negative number)							
5 Foreign tax carryover expired unused in current tax year (enter as a negative number)							
6 Foreign tax carryover generated in current tax year							
7 Actual or estimated amount of line 6 to be carried back to prior tax year (enter as a negative number)							
8 Foreign tax carryover to the following tax year. Combine lines 3 through 7.	-0-						

For Paperwork Reduction Act Notice, see the separate instructions.