

Form **6251**

IS NOT APPLY
Alternative Minimum Tax - Individuals

OMB No. 1545-0074

2021
Attachment
Sequence No. **32**

Department of the Treasury
Internal Revenue Service (99)

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

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

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

Your social security number

ROBERT S. & PAMELA J. WEINROTH

067-44-7798

Part I Alternative Minimum Taxable Income

1	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract line 14 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	1	272326.
2a	If filing Schedule A (Form 1040), enter the taxes from Schedule A, line 7; otherwise, enter the amount from Form 1040 or 1040-SR, line 12a	2a	5689.
2b	Tax refund from Schedule 1 (Form 1040), line 1 or line 8z	2b	
2c	Investment interest expense (difference between regular tax and AMT)	2c	
2d	Depletion (difference between regular tax and AMT)	2d	
2e	Net operating loss deduction from Schedule 1 (Form 1040), line 8a. Enter as a positive amount	2e	
2f	Alternative tax net operating loss deduction	2f	
2g	Interest from specified private activity bonds exempt from the regular tax	2g	
2h	Qualified small business stock, see instructions	2h	
2i	Exercise of incentive stock options (excess of AMT income over regular tax income)	2i	
2j	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	2j	
2k	Disposition of property (difference between AMT and regular tax gain or loss)	2k	
2l	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	2l	
2m	Passive activities (difference between AMT and regular tax income or loss)	2m	
2n	Loss limitations (difference between AMT and regular tax income or loss)	2n	
2o	Circulation costs (difference between regular tax and AMT)	2o	
2p	Long-term contracts (difference between AMT and regular tax income)	2p	
2q	Mining costs (difference between regular tax and AMT)	2q	
2r	Research and experimental costs (difference between regular tax and AMT)	2r	
2s	Income from certain installment sales before January 1, 1987	2s	
2t	Intangible drilling costs preference	2t	
3	Other adjustments, including income-based related adjustments	3	
4	Alternative minimum taxable income. Combine lines 1 through 3. (If married filing separately and line 4 is more than \$752,800, see instructions.)	4	278015.

Part II Alternative Minimum Tax (AMT)

5	Exemption. IF your filing status is ... AND line 4 is not over ... THEN enter on line 5 ... Single or head of household \$523,600 \$73,600 Married filing jointly or qualifying widow(er) ... 1,047,200 114,600 Married filing separately 523,600 57,300 If line 4 is over the amount shown above for your filing status, see instructions.	5	114600.
6	Subtract line 5 from line 4. If more than zero, go to line 7. If zero or less, enter -0- here and on lines 7, 9, and 11, and go to line 10	6	163415.
7	• If you are filing Form 2555, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; you reported qualified dividends on Form 1040 or 1040-SR, line 3a; 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 40 here. • All others: If line 6 is \$199,900 or less (\$99,950 or less if married filing separately), multiply line 6 by 26% (0.26). Otherwise, multiply line 6 by 28% (0.28) and subtract \$3,998 (\$1,999 if married filing separately) from the result.	7	41527.
8	Alternative minimum tax foreign tax credit (see instructions)	8	
9	Tentative minimum tax. Subtract line 8 from line 7	9	41527.
10	Add Form 1040 or 1040-SR, line 16 (minus any tax from Form 4972), and Schedule 2 (Form 1040), line 2. Subtract from the result Schedule 3 (Form 1040), line 1 and any negative amount reported on Form 8978, line 14 (treated as a positive number). If zero or less, enter -0-. If you used Schedule J to figure your tax on Form 1040 or 1040-SR, line 16, refigure that tax without using Schedule J before completing this line. See instructions	10	52614.
11	AMT. Subtract line 10 from line 9. If zero or less, enter -0-. Enter here and on Schedule 2 (Form 1040), line 1	11	0.

Part III Tax Computation Using Maximum Capital Gains Rates

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

Table with 3 columns: Line number, Description, and Amount. Rows 12-40. Includes instructions for each line and numerical values such as 163415, 8738, 154677, 40216, 80800, 263588, 501600, 263588, 238012, 1311, 41527, 42488, 41527.

Qualified Business Income Deduction Simplified Computation

2021

Department of the Treasury
Internal Revenue Service

▶ Attach to your tax return.

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

Attachment
Sequence No. **55**

Name(s) shown on return

Your taxpayer identification number

ROBERT S. & PAMELA J. WEINROTH

067-44-7798

Note. You can claim the qualified business income deduction only if you have qualified business income from a qualified trade or business, real estate investment trust dividends, publicly traded partnership income, or a domestic production activities deduction passed through from an agricultural or horticultural cooperative. See instructions.
Use this form if your taxable income, before your qualified business income deduction, is at or below \$164,900 (\$164,925 if married filing separately; \$329,800), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i	PJW CONSULTING LLC	[REDACTED]	814.
ii			
iii			
iv			
v			
2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)	2 814.	
3	Qualified business net (loss) carryforward from the prior year STATEMENT 17	3 (23202.)	
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-	4 0.	
5	Qualified business income component. Multiply line 4 by 20% (0.20)		5
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions) SEE STATEMENT 16	6 308.	
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7 ()	
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0-	8 308.	
9	REIT and PTP component. Multiply line 8 by 20% (0.20)		9 62.
10	Qualified business income deduction before the income limitation. Add lines 5 and 9		10 62.
11	Taxable income before qualified business income deduction	11 272388.	
12	Net capital gain (see instructions)	12 8738.	
13	Subtract line 12 from line 11. If zero or less, enter -0-	13 263650.	
14	Income limitation. Multiply line 13 by 20% (0.20)		14 52730.
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also enter this amount on the applicable line of your return ▶		15 62.
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-		16 (22388.)
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-		17 ()

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

Form **8995** (2021)

Qualified Business Income After Deductions

Activity: PJW CONSULTING LLC

1.	Qualified business income before deductions		<u>876.</u>
2.	Deductible part of self-employment income:		
a.	Net income subject to self-employment tax from this activity	876.	
b.	Total income subject to self-employment tax	876.	
c.	Line 2a divided by line 2b (not greater than 1.000)	1.000000000	
d.	Amount from Schedule 1 (Form 1040), line 15	62.	
e.	Line 2c times line 2d. This is the allocated deductible part of self-employment tax for this activity		<u>62.</u>
3.	Self-employed SEP, SIMPLE and qualified plans:		
a.	Net income subject to self-employment tax from this activity		
b.	Net earnings from		
c.	Line 3a divided by line 3b (not greater than 1.000)		
d.	Amount from Schedule 1 (Form 1040), line 16		
e.	Line 3c times line 3d. This is the allocated self-employed SEP, SIMPLE and qualified plans amount for this activity		
4.	Self-employed health insurance deduction:		
a.	Health insurance payments from this activity		
b.	Health insurance limits for activity above		
c.	Lesser of line 4a or line 4b		
d.	Reserved		
e.	Reserved		
f.	Amount from line 4c. This is the allocated SE health insurance deduction for this activity		
5.	Line 1 minus lines 2e, 3e and 4f. This is the qualified business income after deductions		<u>814.</u>

SUPERVISOR OF ELECTIONS
 2022 JUN 14 PM 12:47
 PALM BEACH COUNTY FL

Activity: _____

1.	Qualified business income before deductions		
2.	Deductible part of self-employment income:		
a.	Net income subject to self-employment tax from this activity		
b.	Total income subject to self-employment tax		
c.	Line 2a divided by line 2b (not greater than 1.000)		
d.	Amount from Schedule 1 (Form 1040), line 15		
e.	Line 2c times line 2d. This is the allocated deductible part of self-employment tax for this activity		
3.	Self-employed SEP, SIMPLE and qualified plans:		
a.	Net income subject to self-employment tax from this activity		
b.	Net earnings from		
c.	Line 3a divided by line 3b (not greater than 1.000)		
d.	Amount from Schedule 1 (Form 1040), line 16		
e.	Line 3c times line 3d. This is the allocated self-employed SEP, SIMPLE and qualified plans amount for this activity		
4.	Self-employed health insurance deduction:		
a.	Health insurance payments from this activity		
b.	Health insurance limits for activity above		
c.	Lesser of line 4a or line 4b		
d.	Reserved		
e.	Reserved		
f.	Amount from line 4c. This is the allocated SE health insurance deduction for this activity		
5.	Line 1 minus lines 2e, 3e and 4f. This is the qualified business income after deductions		

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

2021

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to your tax return.

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

Attachment
Sequence No. **72**

Name(s) shown on your tax return
ROBERT S. & PAMELA J. WEINROTH

Your social security number or EIN
067-44-7798

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	1317.
2	Ordinary dividends (see instructions)		2	11821.
3	Annuities (see instructions)		3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	4a		
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b		
c	Combine lines 4a and 4b		4c	
5a	Net gain or loss from disposition of property (see instructions)	5a	-3000.	
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	-3000.
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	10138.

Part II Investment Expenses Allocable to Investment Income and Modifications

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

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13-17. Estates and trusts, complete lines 18a-21. If zero or less, enter -0-		12	10138.
Individuals:				
13	Modified adjusted gross income (see instructions)	13	303974.	
14	Threshold based on filing status (see instructions)	14	250000.	
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	53974.	
16	Enter the smaller of line 12 or line 15		16	10138.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). Enter here and include on your tax return (see instructions)		17	385.
Estates and Trusts:				
18a	Net investment income (line 12 above)	18a		
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b		
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-	18c		
19a	Adjusted gross income (see instructions)	19a		
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b		
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c		
20	Enter the smaller of line 18c or line 19c		20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions)		21	

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

Form 8960 (2021)

Noncash Charitable Contributions

(Rev. December 2021)

Attach one or more Forms 8283 to your tax return if you claimed a total deduction of over \$500 for all contributed property.

Department of the Treasury Internal Revenue Service

Go to www.irs.gov/Form8283 for instructions and the latest information.

Attachment Sequence No. 155

Name(s) shown on your income tax return

Identifying number

ROBERT S. & PAMELA J. WEINROTH

067-44-7798

Note: Figure the amount of your contribution deduction before completing this form. See your tax return instructions.

Section A. Donated Property of \$5,000 or Less and Publicly Traded Securities - List in this section only an item (or a group of similar items) for which you claimed a deduction of \$5,000 or less. Also list publicly traded securities and certain other property even if the deduction is more than \$5,000. See instructions.

Part I Information on Donated Property - If you need more space, attach a statement.

Table with 3 columns: (a) Name and address of the donee organization, (b) If donated property is a vehicle, check the box, (c) Description and condition of donated property.

Note: If the amount you claimed as a deduction for an item is \$500 or less, you do not have to complete columns (e), (f), and (g).

Table with 7 columns: (d) Date of the contribution, (e) Date acquired by donor, (f) How acquired by donor, (g) Donor's cost or adjusted basis, (h) Fair market value, (i) Method used to determine the fair market value.

Section B. Donated Property Over \$5,000 (Except Publicly Traded Securities, Vehicles, Intellectual Property or Inventory Reportable in Section A) - Complete this section for one item (or a group of similar items) for which you claimed a deduction of more than \$5,000 per item or group (except contributions reportable in Section A). Provide a separate form for each item donated unless it is part of a group of similar items. A qualified appraisal is generally required for items reportable in Section B. See instructions.

Part I Information on Donated Property

2 Check the box that describes the type of property donated.

- a Art* (contribution of \$20,000 or more)
b Qualified Conservation Contribution
c Equipment
d Art* (contribution of less than \$20,000)
e Other Real Estate
f Securities
g Collectibles**
h Intellectual Property
i Vehicles
j Clothing and household items
k Other

*Art includes paintings, sculptures, watercolors, prints, drawings, ceramics, antiques, decorative arts, textiles, carpets, silver, rare manuscripts, historical memorabilia, and other similar objects.

**Collectibles include coins, stamps, books, gems, jewelry, sports memorabilia, dolls, etc., but not art as defined above.

Note: In certain cases, you must attach a qualified appraisal of the property. See instructions.

Table with 3 columns: (a) Description of donated property, (b) If any tangible personal property or real property was donated, give a brief summary of the overall physical condition of the property at the time of the gift, (c) Appraised fair market value.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return. SCHEDULE C- 1

Attachment Sequence No. 179

Go to www.irs.gov/Form4562 for instructions and the latest information.

Name(s) shown on return

Business or activity to which this form relates

Identifying number

ROBERT S. & PAMELA J. WEINROTH

PJW CONSULTING LLC

087-44-7798

Part I Election To Expense Certain Property Under Section 179 Note: If you have any listed property, complete Part V before you complete Part I.

Table with 5 main rows for Section 179 election. Rows include: 1. Maximum amount, 2. Total cost of section 179 property placed in service, 3. Threshold cost of section 179 property before reduction in limitation, 4. Reduction in limitation, 5. Dollar limitation for tax year, 6. Description of property, 7. Listed property, 8. Total elected cost of section 179 property, 9. Tentative deduction, 10. Carryover of disallowed deduction from line 13 of your 2020 Form 4562, 11. Business income limitation, 12. Section 179 expense deduction, 13. Carryover of disallowed deduction to 2022.

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property.)

Table with 3 rows for Special Depreciation Allowance: 14. Special depreciation allowance for qualified property, 15. Property subject to section 168(f)(1) election, 16. Other depreciation (including ACRS).

Part III MACRS Depreciation (Don't include listed property. See instructions.)

Section A: 17. MACRS deductions for assets placed in service in tax years beginning before 2021, 18. If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here.

Section B - Assets Placed in Service During 2021 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month and year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 19a-g (3-year to 25-year property) and 19h-i (Residential rental and Nonresidential real property).

Section C - Assets Placed in Service During 2021 Tax Year Using the Alternative Depreciation System

Table with 6 columns: 20a. Class life, 20b. 12-year, 20c. 30-year, 20d. 40-year.

Part IV Summary (See instructions.)

Table with 2 rows: 21. Listed property. Enter amount from line 28, 22. Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.

Part V

Listed Property (Include automobiles, certain other vehicles, certain aircraft, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? 24b If "Yes," is the evidence written?

Table with columns (a) Type of property, (b) Date placed in service, (c) Business/investment use percentage, (d) Cost or other basis, (e) Basis for depreciation, (f) Recovery period, (g) Method/Convention, (h) Depreciation deduction, (i) Elected section 179 cost.

25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use

26 Property used more than 50% in a qualified business use: Table with columns for percentage and other details.

27 Property used 50% or less in a qualified business use: Table with columns for percentage and other details.

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1

29 Add amounts in column (i), line 26. Enter here and on line 7, page 1

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

Table for Section B with columns (a) through (f) for Vehicle and rows 30-36 regarding miles driven and personal use.

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who aren't more than 5% owners or related persons.

Table for Section C with rows 37-41 regarding policy statements and vehicle use by employees.

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," don't complete Section B for the covered vehicles.

Part VI Amortization

Table for Part VI with columns (a) Description of costs, (b) Date amortization begins, (c) Amortizable amount, (d) Code section, (e) Amortization period or percentage, (f) Amortization for this year.

42 Amortization of costs that begins during your 2021 tax year:

43 Amortization of costs that began before your 2021 tax year

44 Total. Add amounts in column (f). See the instructions for where to report

2021 DEPRECIATION AND AMORTIZATION REPORT

PJW CONSULTING LLC

SCHEDULE C-1

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 Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	START-UP COSTS	01/31/18		180M		43	2119.				2119.	411.		141.	552.
	TOTAL SCH C DEPR. & AMORTIZATION						2119.				2119.	411.		141.	552.

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2022 JUN 14 PM 12: 67
PALM BEACH COUNTY FL

NAME
ROBERT S. & PAMELA J. WEINROTH 067-44-7798

INCOME TYPE	TOTAL	U.S.	FOREIGN PASSIVE
Compensation	213141.	213141.	
Dividends/Distributions	11821.	11821.	
Interest	1317.	1317.	
Capital Gains	8751.	8751.	
Business/Profession	5550.	5550.	
Rent/Royalty			
State/Local Refunds			
Partnership/S Corporation			
Trust/Estate			
Other Income	79881.	79881.	
Gross Income	320461.	320461.	
Less:			
Section 911 Exclusion			
Capital Losses	11751.	11751.	
Capital Gains Tax Adjustment			
Total Income - Form 1116	308710.	308710.	
Deductions:			
Business/Profession Expenses	4674.	4674.	
Rent/Royalty Expenses			
Partnership/S Corporation Losses			
Trust/Estate Losses			
Capital Losses			
Non-capital Losses			
Individual Retirement Account			
Moving Expenses			
Self-employment Tax Deduction	62.	62.	
Self-employment Health Insurance			
Keogh Contributions			
Alimony			
Forfeited Interest			
Foreign Housing Deduction			
Other Adjustments			
Capital Gains Tax Adjustment			
Total Deductions	4736.	4736.	
Adjusted Gross Income	303974.	303974.	
Less Itemized Deductions:			
Specifically Allocated	15817.	15817.	
Home Mortgage Interest	10080.	10080.	
Other Interest			
Ratably Allocated	5689.	5689.	
Charitable Deduction if taking Standard Deduction			
Total Adjustments to Adjusted Gross Income	31586.	31586.	
Taxable Income	272388.	272388.	

SUPERVISOR OF ELECTIONS
 2022 JUN 14 PM 12:47
 PALM BEACH COUNTY, FL

127981 10-08-21

Form 1116

Allocation of Itemized Deductions

NAME

ROBERT S. & PAMELA J. WEINROTH

067-44-7798

	Total Itemized Deductions	Form 1116		
		Specifically U.S.	Specifically Foreign	Ratable
Medical/Dental				
Taxes	5689.			5689.
Interest - Not Including Investment Interest	10080.	10080.		
Investment Interest				
Contributions	15817.	15817.		
Casualty Losses				
Other Miscellaneous Deductions - Not Including Gambling Losses				
Gambling Losses				
Foreign Adjustment				
Total Itemized Deductions	31586.	25897.		5689.

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 2022 JUN 14 PM 12:48
 PALM BEACH COUNTY, FL

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 1

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T PALM BEACH COUNTY	102005.	9682.			6520.	1525.
S BOCA WEST COMMUNITY CHARITABLE	111136.	17718.			6890.	1611.
TOTALS	213141.	27400.			13410.	3136.

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 2

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
MORGAN STANLEY #7917	11513.	8738.
TOTAL INCLUDED IN FORM 1040, LINE 3A		8738.

FORM 1040 IRA DISTRIBUTIONS STATEMENT 3

NAME OF PAYER	GROSS DISTRIBUTION	TAXABLE AMOUNT
NATIONAL FINANCIAL SERVICES LLC	13706.	13706.
PRUCO LIFE INSURANCE CO	26068.	26068.
PRUCO LIFE INSURANCE CO	23441.	23441.
JOHN HANCOCK LIFE INS. CO. (U.S.A.) US ANNUITY TAX TEAM	4232.	4232.
TOTAL TO FORM 1040, LINES 4A AND 4B	67447.	67447.

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 2022 JUN 14 PM 12:48
 PALM BEACH COUNTY, FL

FORM 1040 PENSIONS AND ANNUITIES STATEMENT 4

STATE STREET RETIREE SERVICES FOR AMERICAN INTERNATIONAL GROUP INC RETIREMEN

AMOUNT RECEIVED THIS YEAR 12434.

NONTAXABLE AMOUNT

CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D

12434.

TOTAL INCLUDED IN FORM 1040, LINE 5B

12434.

FORM 1040 TAX STATEMENT 5

DESCRIPTION AMOUNT

FROM QUALIFIED DIVIDENDS AND CAPITAL GAIN WORKSHEET 52614.

TOTAL TO FORM 1040, LINE 16 52614.

FORM 1040 FEDERAL INCOME TAX WITHHELD - FORM(S) W-2 STATEMENT 6

T S DESCRIPTION AMOUNT

T PALM BEACH COUNTY 9682.

S BOCA WEST COMMUNITY CHARITABLE 17718.

TOTAL TO FORM 1040, LINE 25A 27400.

FORM 1040 CURRENT YEAR ESTIMATES AND AMOUNT APPLIED FROM PREVIOUS YEAR STATEMENT 7

DESCRIPTION AMOUNT

PRIOR YEAR OVERPAYMENT APPLIED - JOINT 3212.

TOTAL TO FORM 1040, LINE 26 3212.

PALM BEACH COUNTY, FL 2021 JUN 14 PM 12:48

FORM 1040 FEDERAL INCOME TAX WITHHELD - FORM(S) 1099 STATEMENT 8

DESCRIPTION	AMOUNT
T NATIONAL FINANCIAL SERVICES LLC	2056.
T PRUCO LIFE INSURANCE CO	3910.
S PRUCO LIFE INSURANCE CO	3516.
S JOHN HANCOCK LIFE INS. CO. (U.S.A.) US ANNUITY TAX TEAM	635.
TOTAL TO FORM 1040, LINE 25B	10117.

SCHEDULE A MORTGAGE INTEREST AND POINTS REPORTED ON FORM 1098 STATEMENT 9

DESCRIPTION	AMOUNT
HOME MORTGAGE INTEREST PAID TO A FINANCIAL INSTITUTION	0.
MORGAN STANLEY PRIVATE BANK, PO BOX 77404, EWING, NJ 08628	10080.
TOTAL TO SCHEDULE A, LINE 8A	10080.

SCHEDULE A REAL ESTATE TAXES STATEMENT 10

DESCRIPTION	AMOUNT
REAL ESTATE TAXES	130.
MORGAN STANLEY PRIVATE BANK	3547.
TOTAL TO SCHEDULE A, LINE 5B	3677.

SCHEDULE B DIVIDEND INCOME STATEMENT 11

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
FUNDRISE INCOME EREIT 2019, LLC	31.	
FUNDRISE REAL ESTATE INVESTMENT TRUST, LLC	22.	
CHARLES SCHWAB & CO INC		
FUNDRISE INCOME EREIT 2019, LLC	31.	
FUNDRISE INCOME EREIT II, LLC	17.	
FUNDRISE WEST COAST OPPORTUNISTIC REIT, LLC	17.	
FUNDRISE BALANCED EREIT LLC	2.	
FUNDRISE EREIT XIV LLC	38.	

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FUNDRISE INCOME EREIT V, LLC	27.	
FUNDRISE BALANCED EREIT LLC	2.	
FUNDRISE EREIT XIV LLC	38.	
FUNDRISE INCOME EREIT V, LLC	27.	
FUNDRISE INCOME EREIT II, LLC	17.	
FUNDRISE WEST COAST OPPORTUNISTIC REIT, LLC	17.	
FUNDRISE REAL ESTATE INVESTMENT TRUST, LLC	22.	
FUNDRISE REAL ESTATE INTERVAL FUND LLC		
FUNDRISE REAL ESTATE INTERVAL FUND		
MORGAN STANLEY #7917	11513.	8738.
TOTAL TO SCHEDULE B, LINE 5	<u>11821.</u>	

SCHEDULE C		GROSS RECEIPTS	STATEMENT 12
DESCRIPTION			AMOUNT
FINANCIAL INDUSTRY REGULATORY AUTHORITY, INC. - FROM 1099-NEC			5150.
GROSS RECEIPTS			400.
TOTAL TO SCHEDULE C, LINE 1			<u>5550.</u>

SCHEDULE D		CAPITAL GAIN DISTRIBUTIONS	STATEMENT 13
NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN	
FUNDRISE MIDLAND OPPORTUNISTIC EREIT LLC	10.		
FUNDRISE EAST COAST OPPORTUNISTIC REIT, LLC	11.		
FUNDRISE EQUITY REIT LLC	3.		
FUNDRISE GROWTH EREIT II LLC	2.		
FUNDRISE GROWTH EREIT II LLC	2.		
FUNDRISE MIDLAND OPPORTUNISTIC EREIT LLC	10.		
FUNDRISE EAST COAST OPPORTUNISTIC REIT, LLC	11.		
FUNDRISE EQUITY REIT LLC	3.		
TOTALS TO SCHEDULE D, LINE 13	<u>52.</u>		

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SCHEDULE D	CAPITAL LOSS CARRYOVER	STATEMENT 14
1. ENTER THE AMOUNT FROM FORM 1040, LINE 15		272326.
2. ENTER THE LOSS FROM SCHEDULE D, LINE 21, AS A POSITIVE AMOUNT		3000.
3. COMBINE LINES 1 AND 2. IF ZERO OR LESS, ENTER -0-		275326.
4. ENTER THE SMALLER OF LINE 2 OR LINE 3		3000.
5. ENTER THE LOSS FROM SCHEDULE D, LINE 7, AS A POSITIVE AMOUNT		45929.
6. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 15		
7. ADD LINES 4 AND 6		3000.
8. SHORT-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 7 FROM LINE 5. IF ZERO OR LESS, ENTER -0-		42929.
9. ENTER THE LOSS FROM SCHEDULE D, LINE 15, AS A POSITIVE AMOUNT		83806.
10. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 7		
11. SUBTRACT LINE 5 FROM LINE 4. IF ZERO OR LESS, ENTER -0-		
12. ADD LINES 10 AND 11		
13. LONG-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 12 FROM LINE 9. IF ZERO OR LESS, ENTER -0-		83806.

SCHEDULE SE	NON-FARM INCOME	STATEMENT 15
DESCRIPTION		AMOUNT
MARKETING		876.
TOTAL TO SCHEDULE SE, LINE 2		876.

FORM 8995 QUALIFIED REIT DIVIDENDS AND PTP INCOME STATEMENT 16

NAME OF ENTITY/ACTIVITY	REIT DIVIDENDS	PTP INCOME
FUNDRISE INCOME EREIT 2019, LLC	31.	
FUNDRISE REAL ESTATE INVESTMENT TRUST, LLC	22.	
FUNDRISE INCOME EREIT 2019, LLC	31.	
FUNDRISE INCOME EREIT II, LLC	17.	
FUNDRISE WEST COAST OPPORTUNISTIC REIT, LLC	17.	
FUNDRISE BALANCED EREIT LLC	2.	
FUNDRISE EREIT XIV LLC	38.	
FUNDRISE INCOME EREIT V, LLC	27.	
FUNDRISE BALANCED EREIT LLC	2.	
FUNDRISE EREIT XIV LLC	38.	
FUNDRISE INCOME EREIT V, LLC	27.	
FUNDRISE INCOME EREIT II, LLC	17.	

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ROBERT S. & PAMELA J. WEINROTH

067-44-7798

FUNDRISE WEST COAST OPPORTUNISTIC REIT, LLC
FUNDRISE REAL ESTATE INVESTMENT TRUST, LLC

17.
22.

TOTAL TO FORM 8995, LINE 6

308.

FORM 8995

QUALIFIED BUSINESS NET LOSS CARRYOVER
FROM PRIOR YEARS

STATEMENT 17

TRADE OR BUSINESS NAME

AMOUNT

TOTAL QUALIFIED BUSINESS NET LOSS FROM PRIOR YEARS

23202.

TOTAL TO FORM 8995, LINE 3

23202.

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2021 DEPRECIATION AND AMORTIZATION REPORT
- CURRENT YEAR FEDERAL - ROBERT S. & PAMELA J. WEINROTH

Asset No.	Description	Date Acquired	Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	START-UP COSTS	013118		180M	43	2119.			2119.	411.		141.
	TOTAL SCH C DEPR. & AMORTIZATION					2119.			2119.	411.		141.

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(D) - Asset disposed * ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

2022 DEPRECIATION AND AMORTIZATION REPORT

- NEXT YEAR FEDERAL - ROBERT S. & PAMELA J. WEINROTH

Asset No.	Description	Date Acquired	Method	Life	Unadjusted Cost Or Basis	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Amount Of Depreciation
1	START-UP COSTS	013118		180M	2119.		2119.	552.	141.
	TOTAL SCH C DEPR. & AMORTIZATION				2119.		2119.	552.	141.

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(D) - Asset disposed

* ITC, Section 179, Salvage, HR 3090, Commercial Revitalization Deduction, GO Zone