

<b>General Information</b>		
Name:	Mr Steven Van Gorden	
Address:	14146 10th Street, Dade City, FL 33525	
County:		
Organization	Suborganization	Title
N/A		
<b>CANDIDATE FOR</b>		
Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board	City of Dade City	Dade City Commissioner Group 4

<b>Net Worth</b>
My Net Worth as of <u>December 31, 2023</u> was <u>-\$ 176,104.24</u> .

## 2023 Form 6 Full and Public Disclosure of Financial Interests

### Assets

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 effect is \$ 32,500.00.

#### ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Cadance Bank Checking Account	\$ 4,067.11
Robin Hood (AMC STOCKS)	\$ 1,418.93
IRA-Charles Schwab	\$ 11,969.13
100% Ownership SVG Realty-Checking Account	\$ 3,864.67
Scholars Edge 529 College Plan	\$ 2,212.54

### Liabilities

#### LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Wells Fargo Auto	PO Box 5265 Sioux Falls, SD 57117	\$ 6,589.62
Student Loans	PO Box 60610 Harrisburg, PA 17106	\$ 225,547.00

#### JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

## 2023 Form 6 Full and Public Disclosure of Financial Interests

### 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 2022 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 2023 federal income tax return and all W2s, schedules, and attachments.

#### PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
See Attached		

#### SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
See Attached			

### Interests in Specified Businesses

**Business Entity # 1**

N/A

## 2023 Form 6 - Full and Public Disclosure of Financial Interests

### Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form6 and that the facts stated in it are true.

***Steven Van Gorden***

Digitally signed: 02/16/2024

Form 1040 Department of the Treasury—Internal Revenue Service U.S. Individual Income Tax Return

2023

OMB No. 1545-0074

IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning , 2023, ending , 20 .....

See separate instructions.

Your first name and middle initial STEVEN P.

Last name VAN GORDEN

Your social security number

If joint return, spouse's first name and middle initial

Last name

Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions.

14146 10TH STREET

Apt. no.

City, town or post office. If you have a foreign address, also complete spaces below.

DADE CITY

State FL

ZIP code 33525

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.

Foreign country name

Foreign province/state/county

Foreign postal code

You Spouse

Filing Status

Single

Head of household (HOH)

Check only one box.

Married filing jointly (even if only one had income)

Qualifying surviving spouse (QSS)

Married filing separately (MFS)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Digital Assets

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) Yes No

Standard Deduction

Someone can claim: You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness

You: Were born before January 2, 1959 Are blind Spouse: Was born before January 2, 1959 Is blind

Dependents (see instructions):

Table with columns: (1) First name, Last name, (2) Social security number, (3) Relationship to you, (4) Check the box if qualifies for (see instructions): Child tax credit, Credit for other dependents

Income

Main income table with rows 1a through 15 and columns for descriptions and amounts. Total taxable income: 13,903

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

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

Attach Sch. B if required.

Standard Deduction for --

- Single or Married filing separately, \$13,850
Married filing jointly or Qualifying surviving spouse, \$27,700
Head of household, \$20,800
If you checked any box under Standard Deduction, see instructions.

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

Form 1040 (2023)

<b>Tax and Credits</b>	16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	16	1,451
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	1,451
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	
	21	Add lines 19 and 20	21	
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	1,451
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	
24	Add lines 22 and 23. This is your total tax	24	1,451	

<b>Payments</b>	25	Federal income tax withheld from:		
	a	Form(s) W-2	25a	2,610
	b	Form(s) 1099	25b	
	c	Other forms (see instructions)	25c	
	d	Add lines 25a through 25c	25d	2,610
	26	2023 estimated tax payments and amount applied from 2022 return	26	
	27	Earned income credit (EIC)	27	
	28	Additional child tax credit from Schedule 8812	28	
	29	American opportunity credit from Form 8863, line 8	29	
	30	Reserved for future use	30	
31	Amount from Schedule 3, line 15	31		
32	Add lines 27, 28, 29 and 31. These are your total other payments and refundable credits	32		
33	Add lines 25d, 26, and 32. These are your total payments	33	2,610	

<b>Refund</b>	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	1,159
	35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	35a	1,159
	b	Routing number _____ c Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings		
	d	Account number _____		
36	Amount of line 34 you want applied to your 2024 estimated tax	36		

<b>Amount You Owe</b>	37	Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to <a href="http://www.irs.gov/Payments">www.irs.gov/Payments</a> or see instructions	37	
	38	Estimated tax penalty (see instructions)	38	

**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 **RANDALL WOODRUFF** Phone no. **352-596-2883** Personal Identification number (PIN) **85241**

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

Your signature \_\_\_\_\_ Date \_\_\_\_\_ Your occupation **REALTOR** If the IRS sent you an Identity Protection PIN, enter it here (see Instr.) \_\_\_\_\_

Spouse's signature, if a joint return, both must sign. \_\_\_\_\_ Date \_\_\_\_\_ Spouse's occupation \_\_\_\_\_ If the IRS sent your spouse an Identity Protection PIN, enter it here (see Instr.) \_\_\_\_\_

Phone no. \_\_\_\_\_ Email address \_\_\_\_\_

Preparer's name **RANDALL WOODRUFF** Preparer's signature **RANDALL WOODRUFF** Date **02/16/24** PTIN \_\_\_\_\_ Check if:  Self-employed

**Paid Preparer Use Only** Firm's name **SUNCOAST CPA GROUP, PLLC** Phone no. **352-596-2883**  
Firm's address **5471 SPRING HILL DR**  
Firm's EIN **FL 34606-4597** Firm's EIN \_\_\_\_\_

SCHEDULE 1 (Form 1040)

Department of the Treasury Internal Revenue Service

Additional Income and Adjustments to Income

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

Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment Sequence No. 01

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

STEVEN P. VAN GORDEN

Your social security number

Part 1 Additional Income

Table with columns for line numbers (1-10), descriptions of income types (e.g., Taxable refunds, Alimony, Business income), sub-sections (8a-8z), and numerical values. Total additional income is 17,863.

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

Schedule 1 (Form 1040) 2023

**SCHEDULE D**  
**(Form 1040)**

**Capital Gains and Losses**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

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

**2023**

Attachment  
Sequence No. 12

Name(s) shown on return

**STEVEN P. VAN GORDEN**

Your social security number

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	5,331	7,743	985	-1,427
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked	247	259	0	-12
<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 9,146
<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 the back				7 -10,585

**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	2,000	12,421	9,043	-1,378
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked				
<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. See the instructions				13
<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 9,459
<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 the back				15 -10,837

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

Schedule D (Form 1040) 2023



**STEVEN P. VAN GORDEN**

Schedule D (Form 1040) 2023

**Part III Summary**

**16** Combine lines 7 and 15 and enter the result

**16**

**-21,422**

- 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

**18**

**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

**19**

**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 Form 1040, 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)

**21**

**3,000**

**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 Form 1040, line 16.
- No.** Complete the rest of Form 1040, 1040-SR, or 1040-NR.

Form **8949**

# Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

**2023**

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

Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.

Attachment Sequence No. **12A**

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

Social security number or taxpayer identification number

**STEVEN P. VAN GORDEN**

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) (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.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	SEE ATTACHED	Various	Various	5,331	7,743	MW	985	-1,427
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) .....				5,331	7,743		985	-1,427

**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 Notices, see your tax return instructions.

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

**STEVEN P. VAN GORDEN**

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 III 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) (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.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	SEE ATTACHED	Various	Various	2,000	12,421		9,043	-1,378
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) .....			2,000	12,421		9,043	-1,378

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**

# Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

**2023**

Department of the Treasury  
Internal Revenue Service

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

Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.

Attachment  
Sequence No. **12A**

Name(s) shown on return

Social security number or taxpayer identification number

**STEVEN P. VAN GORDEN**

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) (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.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	SEE ATTACHED	Various	Various	247	259			-12
<p>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) .....</p>								
				247	259		0	-12

**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.

Name(s) shown on return. Do not enter name and social security number if shown on other side.

Your social security number

**STEVEN P. VAN GORDEN**

**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, receive a distribution, dispose of stock, or receive a loan repayment from an S corporation, you must check the box in column (e) on line 28 and attach the required basis computation. 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 (f) 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 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 basis computation is required	(f) Check if any amount is not at risk
A	SVG REALTY	S		88-2945757	X	
B						
C						
D						

Passive Income and Loss		Nonpassive Income and Loss		
(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss allowed (see Schedule K-1)	(j) Section 179 expense deduction from Form 4562	(k) Nonpassive income from Schedule K-1
A		0		17,863
B				
C				
D				
29a Totals				17,863
b Totals				
30 Add columns (h) and (k) of line 29a				17,863
31 Add columns (g), (i), and (j) of line 29b				0
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31				17,863

**Part III Income or Loss From Estates and Trusts**

33	(a) Name	(b) Employer identification number
A		
B		

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			
B			
34a Totals			
b Totals			
35 Add columns (d) and (f) of line 34a			35
36 Add columns (c) and (e) of line 34b			36
37 Total estate and trust income or (loss). Combine lines 35 and 36			37

**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 Schedule 1 (Form 1040), line 5	41	17,863
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 1120-S), box 17, code AN; 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, Form 1040-SR, or Form 1040-NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Form **8995**

# Qualified Business Income Deduction Simplified Computation

OMB No. 1545-2294

2023

Department of the Treasury  
Internal Revenue Service

Attach to your tax return.

Attachment  
Sequence No. **55**

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

Name(s) shown on return

**STEVEN P. VAN GORDEN**

Your taxpayer identification number

*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 \$182,100 (\$364,200 if married filing jointly), 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	<b>SVG REALTY</b>	<b>88-2945757</b>	<b>17,863</b>
ii			
iii			
iv			
v			

2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c) .....	17,863	
3	Qualified business net (loss) carryforward from the prior year .....		
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0- .....	17,863	
5	Qualified business income component. Multiply line 4 by 20% (0.20) .....		3,573
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions) .....		
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year .....		
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0- .....	0	
9	REIT and PTP component. Multiply line 8 by 20% (0.20) .....		
10	Qualified business income deduction before the income limitation. Add lines 5 and 9 .....		3,573
11	Taxable income before qualified business income deduction (see instructions) .....	17,379	
12	Enter your net capital gain, if any, increased by any qualified dividends (see instructions) .....		
13	Subtract line 12 from line 11. If zero or less, enter -0- .....	17,379	
14	Income limitation. Multiply line 13 by 20% (0.20) .....		3,476
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 (see instructions) .....		3,476
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0- .....		0
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0- .....		

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

Form **8995** (2023)

Form **7203**

(Rev. December 2022)  
Department of the Treasury  
Internal Revenue Service

**S Corporation Shareholder Stock and Debt Basis Limitations**

OMB No. 1545-2302

Attach to your tax return.

Go to [www.irs.gov/Form7203](http://www.irs.gov/Form7203) for instructions and the latest information.

Attachment Sequence No. 203

Name of shareholder <b>STEVEN P. VAN GORDEN</b>		Identifying number
A Name of S corporation <b>SVG REALTY</b>		B Employer identification number <b>88-2945757</b>
C Stock block (see instructions):		
D Check applicable box(es) to indicate how stock was acquired: (1) <input type="checkbox"/> Original shareholder (2) <input type="checkbox"/> Purchased (3) <input type="checkbox"/> Inherited (4) <input type="checkbox"/> Gifted (5) <input type="checkbox"/> Other:		
E Check if you have a Regulations section 1.1367-1(g) election in effect during the tax year for this S corporation <input type="checkbox"/>		

**Part I Shareholder Stock Basis**

1 Stock basis at the beginning of the corporation's tax year		1	0
2 Basis from any capital contributions made or additional stock acquired during the tax year		2	
3a Ordinary business income (enter losses in Part III)	17,863	3a	
b Net rental real estate income (enter losses in Part III)		3b	
c Other net rental income (enter losses in Part III)		3c	
d Interest income		3d	
e Ordinary dividends		3e	
f Royalties		3f	
g Net capital gains (enter losses in Part III)		3g	
h Net section 1231 gain (enter losses in Part III)		3h	
i Other income (enter losses in Part III)		3i	
j Excess depletion adjustment		3j	
k Tax-exempt income		3k	
l Recapture of business credits		3l	
m Other items that increase stock basis		3m	
4 Add lines 3a through 3m		4	17,863
5 Stock basis before distributions. Add lines 1, 2, and 4		5	17,863
6 Distributions (excluding dividend distributions) <i>Note: If line 6 is larger than line 5, subtract line 5 from line 6 and report the result as a capital gain on Form 8949 and Schedule D. See instructions.</i>		6	
7 Stock basis after distributions. Subtract line 6 from line 5. If the result is zero or less, enter -0-, skip lines 8 through 14, and enter -0- on line 15		7	17,863
8a Nondeductible expenses	3,568	8a	
b Depletion for oil and gas		8b	
c Business credits (sections 50(c)(1) and (5))		8c	
9 Add lines 8a through 8c		9	3,568
10 Stock basis before loss and deduction items. Subtract line 9 from line 7. If the result is zero or less, enter -0-, skip lines 11 through 14, and enter -0- on line 15		10	14,295
11 Allowable loss and deduction items. Enter the amount from line 47, column (c)		11	
12 Debt basis restoration (see net increase in instructions for line 23)		12	
13 Other items that decrease stock basis		13	
14 Add lines 11, 12, and 13		14	
15 Stock basis at the end of the corporation's tax year. Subtract line 14 from line 10. If the result is zero or less, enter -0-		15	14,295

**Part II Shareholder Debt Basis**

**Section A—Amount of Debt (If more than three debts, see instructions.)**

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
	<input type="checkbox"/> Formal note <input type="checkbox"/> Open account	<input type="checkbox"/> Formal note <input type="checkbox"/> Open account	<input type="checkbox"/> Formal note <input type="checkbox"/> Open account	
16 Loan balance at the beginning of the corporation's tax year				
17 Additional loans (see instructions)				
18 Loan balance before repayment. Add lines 16 and 17				
19 Principal portion of debt repayment (this line doesn't include interest)				
20 Loan balance at the end of the corporation's tax year. Subtract lines 19 from line 18				

Form 7203 (Rev. 12-2022)

**Part II Shareholder Debt Basis (continued)**

**Section B—Adjustments to Debt Basis**

Description	(a) Debt 1	(b) Debt 2	(c) Debt 3	(d) Total
21 Debt basis at the beginning of the corporation's tax year				
22 Enter the amount, if any, from line 17				
23 Debt basis restoration (see instructions)				
24 Debt basis before repayment. Add lines 21, 22, and 23				
25 Divide line 24 by line 18				
26 Nontaxable debt repayment. Multiply line 25 by line 19				
27 Debt basis before nondeductible expenses and losses. Subtract line 26 from line 24				
28 Nondeductible expenses and oil and gas depletion deductions in excess of stock basis				
29 Debt basis before losses and deductions. Subtract line 28 from line 27. If the result is zero or less, enter -0-				
30 Allowable losses in excess of stock basis. Enter the amount from line 47, column (d)				
31 Debt basis at the end of the corporation's tax year. Subtract line 30 from line 29. If the result is zero or less, enter -0-				

**Section C—Gain on Loan Repayment**

32 Repayment. Enter the amount from line 19				
33 Nontaxable repayments. Enter the amount from line 26				
34 Reportable gain. Subtract line 33 from line 32				

**Part III Shareholder Allowable Loss and Deduction Items**

Description	(a) Current year losses and deductions	(b) Carryover amounts (column (e)) from the previous year	(c) Allowable loss from stock basis	(d) Allowable loss from debt basis	(e) Carryover amounts
35 Ordinary business loss					
36 Net rental real estate loss					
37 Other net rental loss					
38 Net capital loss					
39 Net section 1231 loss					
40 Other loss					
41 Section 179 deductions					
42 Charitable contributions					
43 Investment interest expense					
44 Section 59(e)(2) expenditures					
45 Other deductions					
46 Foreign taxes paid or accrued					
47 Total loss. Add lines 35 through 46 for each column. Enter the total loss in column (c) on line 11 and enter the total loss in column (d) on line 30					



Name <b>STEVEN P. VAN GORDEN</b>	Taxpayer Identification Number
Name of Entity <b>SVG REALTY</b>	EIN <b>88-2945757</b>
Passive Activity Type <b>Not Passive</b>	K1 Unit <b>1</b>

**Shareholder Stock Basis**

1. Beginning of year stock basis. Per IRC 1367(a)(2) do not enter an amount below zero	1.	0
<b>Increases to stock basis</b>		
2. Capital contributions made or additional stock acquired	2.	
3. Ordinary business income	3.	<u>17,863</u>
4. Net rental real estate income	4.	
5. Other net rental income	5.	
6. Interest, dividends and royalties	6.	
7. Net capital gains	7.	
8. Net section 1231 gain and ordinary business gain	8.	
9. Tax-exempt interest, other tax-exempt income and recapture credits	9.	
10. Other income	10.	
11. Excess of deductions for depletion over basis of property (other than oil and gas)	11.	
12. Other increases to stock basis	12.	
13. Total increases to stock basis. Combine lines 2 through 12	13.	<u>17,863</u>
14. Stock basis before distributions and items of loss or deductions. Add line 1 and line 13 and enter the result here	14.	<u>17,863</u>
<b>Decreases to stock basis</b>		
15. Distributions allowed	15.	
16. Stock basis after distributions and before items of loss or deductions. Subtract line 15 from line 14. If zero or less, enter - 0 -	16.	<u>17,863</u>
17. Losses and deductions applied against stock basis. (See Shareholder Basis Worksheet Page 2)	17.	<u>3,568</u>
18. Other decreases to stock basis	18.	
19. Amount used to restore loan basis	19.	
20. Total decreases (other than distributions) to stock basis. Combine lines 17 through 19	20.	<u>3,568</u>
21. Stock basis at the end of year. (Subtract line 20 from line 16). Per IRC 1367(a)(2) do not enter an amount below zero	21.	<u>14,295</u>

**Shareholder Debt Basis**

22. Debt basis at the beginning of corporation's tax year	22.	
23. Additional loans	23.	
24. Debt basis restoration	24.	
25. Nontaxable debt repayment	25.	
26. Debt basis before losses and deductions. Combine lines 22 through 25	26.	
27. Losses and deductions applied against debt basis. (See Shareholder Basis Worksheet Page 3)	27.	
28. Debt basis at the end of year (Subtract line 28 from line 27).	28.	0
29. Stock and debt basis at the end of the year (Add lines 21 and line 28)	29.	<u>14,295</u>

**Gain Recognized on Excess Distributions**

30. Property distributions reported in Box 16, Code D, Schedule K-1 (1120S)	30.	
31. Stock basis before distributions and loss items (line 14) less gain from the entire disposition of stock reported on line 18.	31.	
32. Total gain recognized on excess distributions. (Subtract line 31 from line 30)	32.	

Sch D/8949, short-term capital gain \_\_\_\_\_
  Sch D/8949, long-term capital gain \_\_\_\_\_



Form **1040**

**Broker Reconciliation Worksheet**

**2023**

Name(s) of Account holder  
**STEVEN P. VAN GORDEN**

Taxpayer identification number

Payer's name  
**Robinhood MARKETS**

Account number

Form/Schedule/Worksheet	Form/Sch Line No.	Form 1099		Amount
		Name	Box No(s)	
<b>Schedule B</b>				
Part I - Interest	1	1099-INT	1, 3, 10	
Part II - Ordinary Dividends	5	1099-DIV	1a	
Nondividend distributions		1099-DIV	3	
<b>Schedule D</b>				
Short-term 1099B transactions with no adjustments, basis reported to IRS	1a	1099-B		
Long-term 1099B transactions with no adjustments, basis reported to IRS	8a	1099-B		
Part II - Capital gain distributions	13	1099-DIV	2a	
28% Rate Capital Gain Worksheet (Schedule D, line 18)	1, 4	1099-DIV, B	2d, 3	
Unrecaptured Section 1250 Gain Worksheet (Schedule D, line 19)	11	1099-DIV	2b	
<b>Schedule A</b>				
State and local income taxes withheld	5a	1099 ALL	17, 15, 16	
Foreign tax deduction	6	1099-INT, DIV	6, 7	
<b>Form 1040</b>				
Tax-exempt interest	2a	1099-INT	8	
Tax-exempt interest dividends	2a	1099-DIV	11	
Qualified dividends	3a	1099-DIV	1b	
Penalty on early withdrawal of savings (Schedule 1)	18	1099-INT	2	
Foreign tax credit (Credit claimed without filing Form 1116) (Schedule 3)	1	1099-INT, DIV	6, 7	
Federal income tax withheld	25b	1099 ALL	4	
Section 199A dividends	13	1099-DIV	5	
<b>Form 1116</b>				
Part II Foreign taxes paid or accrued	8	1099-INT, DIV	6, 7	
<b>Form 6251</b>				
Interest from specified private activity bonds exempt from regular tax	2g	1099-INT	9	
Interest dividends from specified private activity bonds exempt from regular tax	2g	1099-DIV	12	
<b>Form 8949</b>				
<b>Basis reported to IRS</b>				
Short-term - 8949 Box A	1	1099-B		
Short-term - 8949 Box A (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box D	1	1099-B		
Long-term - 8949 Box D (column g) - Wash sale loss disallowed *	1	1099-B		
<b>Basis not reported to IRS</b>				
Short-term - 8949 Box B	1	1099-B		
Short-term - 8949 Box B (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box E	1	1099-B		
Long-term - 8949 Box E (column g) - Wash sale loss disallowed *	1	1099-B		
<b>Not reported on Form 1099-B</b>				
Short-term - 8949 Box C	1	1099-B		
Short-term - 8949 Box C (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F	1	1099-B		
Long-term - 8949 Box F (column g) - Wash sale loss disallowed *	1	1099-B		
Long-term - 8949 Box F - Section 1202 gain exclusion adjustment	1	1099-DIV	2c	
<b>Form 6781</b>				
Net section 1256 contracts loss election				
Part I - Section 1256 Contracts Marked to Market	1	1099-B	11	
Form 1099-B adjustments	4			
Net section 1256 contracts loss carry back	6			
<b>Form 4952</b>				
Investment interest expenses - margin interest	1			

\* Form 8949 column (g), amount of adjustment, is reported as wash sale loss disallowed for any transaction with a "W" in column (f) Code(s) from instructions. Therefore, transactions with multiple codes in column (f), may not reflect the true disallowed wash sale loss.

Form <b>1040</b>	<b>Capital Loss Carryover Worksheets</b>	<b>2023</b>
Name <b>STEVEN P. VAN GORDEN</b>		Taxpayer Identification Number

### 2023 to 2024 Capital Loss Carryover Worksheet

Use this worksheet to figure your capital loss carryovers from 2023 to 2024 if Schedule D, Line 21, is a loss and (a) that loss is a smaller loss than the loss on Schedule D, line 16, or (b) Form 1040, line 15, is less than zero. Otherwise, you do not have any carryovers.

1. Enter the amount from Form 1040, line 15. If a loss, enclose the amount in parentheses .....	1.	13,903
2. Enter the loss from Schedule D, line 21, as a positive amount .....	2.	3,000
3. Combine lines 1 and 2. If zero or less, enter -0- .....	3.	16,903
4. Enter the smaller of line 2 or line 3 .....	4.	3,000
<i>If line 7 of Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.</i>		
5. Enter the loss from Schedule D, line 7, as a positive amount .....	5.	10,585
6. Enter any gain from Schedule D, line 15. If a loss, enter -0- .....	6.	
7. Add lines 4 and 6 .....	7.	3,000
8. Short-term capital loss carryover to 2024. Subtract line 7 from line 5. If zero or less, enter -0- .....	8.	7,585
<i>If line 15 of Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.</i>		
9. Enter the loss from Schedule D, line 15, as a positive amount .....	9.	10,837
10. Enter any gain from Schedule D, line 7 .....	10.	
11. Subtract line 5 from line 4. If zero or less, enter -0- .....	11.	0
12. Add lines 10 and 11 .....	12.	
13. Long-term capital loss carryover to 2024. Subtract line 12 from line 9. If zero or less, enter -0- .....	13.	10,837

### 2023 to 2024 Capital Loss Carryover Worksheet, AMT

Use this worksheet to figure AMT capital loss carryovers from 2023 to 2024 if AMT Schedule D, Line 21, is a loss and (a) that loss is a smaller loss than the loss on AMT Schedule D, line 16 or (b) Form 6251, line 4 is a loss. Otherwise, you do not have any carryovers.

1. Enter the amount from Form 6251, line 4. If a loss, enclose the amount in parentheses .....	1.	27,753
2. Enter the loss from AMT Schedule D, line 21 as a positive amount .....	2.	3,000
3. Combine lines 1 and 2. If zero or less, enter -0- .....	3.	30,753
4. Enter the smaller of line 2 or line 3 .....	4.	3,000
<i>If line 7 of AMT Schedule D is a loss, go to line 5; otherwise, enter -0- on line 5 and go to line 9.</i>		
5. Enter the loss from AMT Schedule D, line 7 as a positive amount .....	5.	10,585
6. Enter the gain, if any, from AMT Schedule D, line 15 .....	6.	
7. Add lines 4 and 6 .....	7.	3,000
8. AMT Short-term capital loss carryover to 2024. Subtract line 7 from line 5. If zero or less, enter -0- .....	8.	7,585
<i>If line 15 of AMT Schedule D is a loss, go to line 9; otherwise, skip lines 9 through 13.</i>		
9. Enter the loss from AMT Schedule D, line 15, as a positive amount .....	9.	10,837
10. Enter the gain, if any, from AMT Schedule D, line 7 .....	10.	
11. Subtract line 5 from line 4. If zero or less, enter -0- .....	11.	0
12. Add lines 10 and 11 .....	12.	
13. AMT Long-term capital loss carryover to 2024. Subtract line 12 from line 9. If zero or less, enter -0- .....	13.	10,837

### Form 982 Reduction of Capital Loss Carryovers to 2024

	Regular	AMT
1. Subtract 2023 to 2024 Capital Loss Carryover Worksheet, line 7 from line 5 .....	1.	
2. Form 982 line 9 reduction of tax attributes applied to short-term capital loss carryover .....	2.	
3. Adjusted Short-term capital loss carryover to 2024. Subtract line 2 from line 1. Enter this amount on line 8 in the 2023 to 2024 Capital Loss Carryover Worksheet .....	3.	
4. Subtract 2023 to 2024 Capital Loss Carryover Worksheet, line 12 from line 9 .....	4.	
5. Form 982 line 9 reduction of tax attributes applied to long-term capital loss carryover .....	5.	
6. Adjusted Long-term capital loss carryover to 2024. Subtract line 5 from line 4. Enter this amount on line 13 in the 2023 to 2024 Capital Loss Carryover Worksheet .....	6.	

Form <b>1040</b>	<b>QTP/ESA Basis Worksheet</b>	<b>2022</b>
------------------	--------------------------------	-------------

Name <b>STEVEN P. VAN GORDEN</b>	Taxpayer Identification Number
-------------------------------------	--------------------------------

Payer's/Trustee's name	<b>EDUCATION TRUST BOARD OF NM</b>
Account type	<b>State QTP</b> Account number
Beneficiary first name	Beneficiary last name

**Worksheet for Determining QTP/ESA Basis Amounts**

- |  |          |
|--|----------|
| 1. Basis in QTP/ESA as of December 31, 2022          | 1. _____ |
| 2. Enter QTP/ESA contributions for 2023              | 2. _____ |
| 3. Add lines 1 and 2                                 | 3. _____ |
| 4. Enter distributions from this QTP/ESA during 2023 | 4. _____ |
| 5. Subtract Line 4 from Line 3                       | 5. _____ |
| 6. Other increases or decreases to basis             | 6. _____ |
| 7. Basis in your QTP or ESA as of December 31, 2023  | 7. _____ |

K-1 Reconciliation Worksheet - Qualified Business Income

2023

Schedule E

Name STEVEN P. VAN GORDEN

EIN 88-2945757

Entity Type S Corporation

Taxpayer Identification Number

Entity Name SVG REALTY

Passive Activity Type

Not Passive

Screen K1

K1 Unit 1

Activity Entire disposition of activity

Qualified Business Income	Screen K1 QBI Amount	QBI Items from Schedule K-1	Basis Limit Adjustment	At-risk Limit Adjustment	Passive Limitation	Qualified Business Income	Prior Year Suspended QBI Losses Allowed		
							Prior Year Suspended / 179	Basis	At-risk
Ordinary business inc./loss	17,863					17,863			
Net rental real estate inc./loss									
Other net rental income/loss									
Royalties									
Section 1231 gain (loss)									
Section 179 expense									
Disallowed Section 179 exp									
Other income (loss)									
Other income/loss Form 1040									
Reserved									
Other deductions									
4797 ordinary income / -loss									
Depletion									
UPE + Debt financed acquir									
Deductible part of SE tax									
Self-employed health insurance									
Self-employed qualified plans									
Ordinary gains on distribution									
<b>Total Qualified Business Income</b>						<b>17,863</b>			

Form 8995 or 8995-A

Qualified business net (loss) carryforward from prior years Form 8995, line 3 or Form 8995-A (Schedule C), line 2

Suspended Loss Carryforwards	Pre-TCJA Passive	Post-TCJA Passive	Pre-TCJA Basis	Post-TCJA Basis	Pre-TCJA At-Risk	Post-TCJA At-Risk	Other carryovers
Ordinary business loss							
Net rental real estate loss							
Other net rental loss							
Section 179 expense							
Depletion							
Section 59(e)(2) expenditure							
Preproductive period exp							
Reforestation expense ded							
Other deductions							
Other losses - Schedule E							
Dependent care expense							
4797 - Ordinary loss							
Other losses - 1040 Sch 1							
Section 1231 loss							

**Federal Statements**

**SVG REALTY LLC**

**Form W-2, Box 14 - Other**

Description	Amount
Medical insurance premiums	\$ _____
Total	\$ <u>0</u>

Form **1040**

**Carryover Report**

**2023**

Name

**STEVEN P. VAN GORDEN**

Taxpayer Identification Number

Carryover Item	Available to 2023	2023 Amounts		Carryover to 2024
Minimum tax credit				
Investment interest				
Investment interest - AMT				
Short-term capital loss	<u>9,146</u>	<u>Utilized</u>	<u>-1,561</u>	<u>7,585</u>
Short-term capital loss - AMT	<u>9,146</u>	<u>Utilized</u>	<u>-1,561</u>	<u>7,585</u>
Long-term capital loss	<u>9,459</u>	<u>Generated</u>	<u>1,378</u>	<u>10,837</u>
Long-term capital loss - AMT	<u>9,459</u>	<u>Generated</u>	<u>1,378</u>	<u>10,837</u>
Residential energy efficient property				
D.C. first-time homebuyer credit				
Tax credit bonds				
Qualified business income loss				
Qualified REIT income and PTP loss				
Excess business loss portion of NOL				

**Nonrecaptured Section 1231 Losses - Line 8, Form 4797**

2018 Amounts		
2019 Amounts		
2020 Amounts		
2021 Amounts		
2022 Amounts		
Available to 2023		
2023 Amounts		
Carryover to 2024		

**AMT Nonrecaptured Section 1231 Losses - Line 8, Form 4797**

2018 Amounts		
2019 Amounts		
2020 Amounts		
2021 Amounts		
2022 Amounts		
Available to 2023		
2023 Amounts		
Carryover to 2024		



Form **1040**

**Pension/Annuity Report**

**2023**

Name

Taxpayer Identification Number

**STEVEN P. VAN GORDEN**

T/S	Payer	Box 7 Code	Gross Distribution	Rollover	Taxable Amount
A	<b>TIAA ADMINISTRATIVE SERVICES</b>	<b>1</b>			
B					
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					
M					
N					
O					
		<b>Taxpayer Spouse Total</b>			

	NIIT	Capital Gain Distribution	Public Safety Officer Exclusion	Federal Withholding	State Withholding	Local Withholding
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
<b>Taxpayer Spouse Total</b>						

Form **1040**

**Salaries & Wages Report**

**2023**

Name

**STEVEN P. VAN GORDEN**

Taxpayer Identification Number

T/S	Employer	Federal Wages	Federal Withheld	Soc Sec Wages
A	<b>SVG REALTY LLC</b>	<b>16,000</b>	<b>2,610</b>	<b>16,000</b>
B				
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
M				
<b>Taxpayer Spouse Totals</b>		<b>16,000</b>	<b>2,610</b>	<b>16,000</b>

	Soc Sec Withheld	Medicare Wages	Medicare Withheld	Soc Sec Tips	Allocated Tips	Dep Care Ben	Other, Box 14
A	<b>992</b>	<b>16,000</b>	<b>232</b>				
B							
C							
D							
E							
F							
G							
H							
I							
J							
K							
L							
M							
<b>Taxpayer Spouse Totals</b>		<b>992</b>	<b>16,000</b>	<b>232</b>			

	State	State Wages	State Withheld	Name of Locality	Local Wages	Local Withheld
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
<b>Taxpayer Spouse Totals</b>						

Name  
**STEVEN P. VAN GORDEN**

Taxpayer Identification Number

Filing Status	2022		2023		Differences
		SGL		SGL	
Dependents		1		0	-1
1. Salaries and wages	1.	37,354		16,000	-21,354
2. Interest income	2.			366	366
3. Tax exempt interest income	3.				
4. Dividend income	4.				
5. Qualified dividend income	5.				
6. Taxable state/local refunds	6.				
7. Alimony received	7.				
8. Business income/loss	8.	-6,123			6,123
9. Capital gain/loss	9.	-3,000		-3,000	
10. Other gains/losses	10.				
11. Taxable IRA distributions	11.				
12. Taxable pensions	12.				
13. Rent and royalty income including farm rental	13.				
14. Partnership/S corp income	14.	36,822		17,863	-18,959
15. Estate or trust income	15.				
16. Farm income/loss	16.				
17. Unemployment compensation	17.				
18. Taxable social security	18.				
19. Other income	19.	1,895			-1,895
20. Total income	20.	66,948		31,229	-35,719
21. Moving expenses	21.				
22. Deductible part of self-employment tax	22.				
23. SEP/SIMPLE/Qualified plans deductions	23.				
24. SE health insurance	24.				
25. Penalty on early withdrawal of savings	25.				
26. Alimony paid	26.				
27. IRA deductions	27.				
28. Student loan interest	28.				
29. Other adjustments	29.				
30. Adjusted gross income	30.	66,948		31,229	-35,719
31. Medical	31.	6,827			-6,827
32. Taxes	32.	839		693	-146
33. Interest	33.				
34. Contributions	34.			200	200
35. Casualty losses	35.				
36. Miscellaneous expenses	36.				
37. Allowable itemized deductions	37.	7,666		893	-6,773
38. Standard deduction	38.	12,950		13,850	900
		Standard		Standard	
39. Deduction taken	39.	12,950		13,850	900
40. Taxable income before Qual Bus Inc Ded (QBID)	40.	53,998		17,379	-36,619
41. QBID	41.	6,140		3,476	-2,664
42. Taxable income	42.	47,858		13,903	-33,955

Name  
**STEVEN P. VAN GORDEN**

Taxpayer Identification Number

	2022	2023	Differences
43. Taxable income from 2YR page 1, line 42	43. 47,858	13,903	-33,955
44. Tax on taxable income	44. 6,150	1,451	-4,699
45. Alternative minimum tax	45.		
46. Excess advance premium tax credit	46.		
47. Child care credit	47.		
48. Education credits	48.		
49. Retirement savings credit	49.		
50. Child & other dependent tax credit	50. 500		-500
51. Other credits	51.		
52. Total credits	52. 500		-500
53. Net tax liability	53. 5,650	1,451	-4,199
54. Self-employment taxes	54.		
55. Other taxes	55. 190		-190
56. Total tax	56. 5,840	1,451	-4,389
57. Income tax withheld	57. 13,600	2,610	-10,990
58. Estimated tax payments	58.		
59. Earned income credit	59.		
60. Additional Child tax credit	60.		
61. Other refundable tax credits	61.		
62. Other payments	62.		
63. Total payments	63. 13,600	2,610	-10,990
64. Tax due/refund	64. -7,760	-1,159	6,601
65. Penalties and interest	65.		
66. Net tax due/refund	66. -7,760	-1,159	6,601
67. Refund applied to estimated tax payments	67.		
68. Refund received	68. -7,760	-1,159	6,601
69. Effective tax rate	69. 12.0 %	10.0 %	

Two Year Comparison of Tax Burden Relative to Annual Tax Return

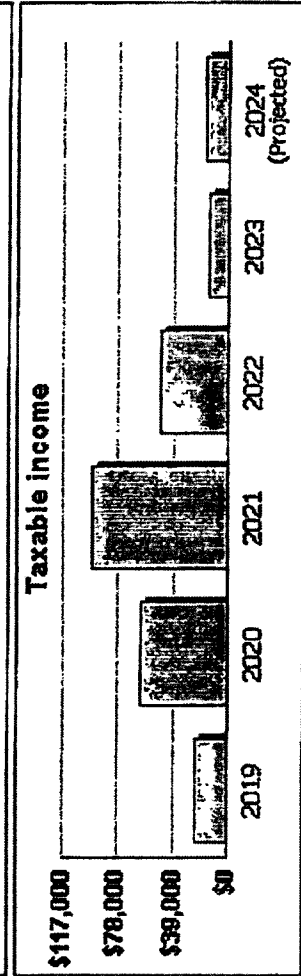
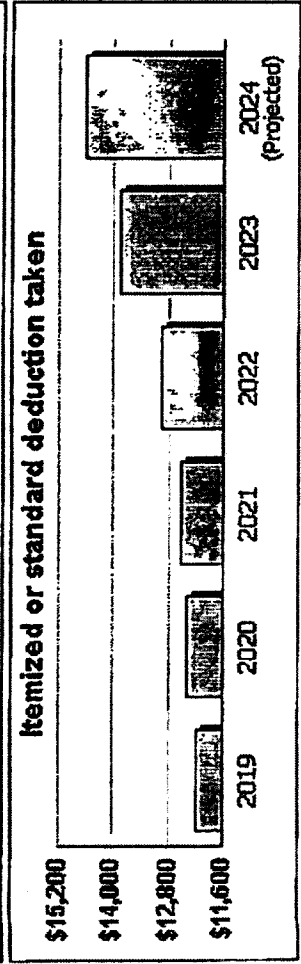
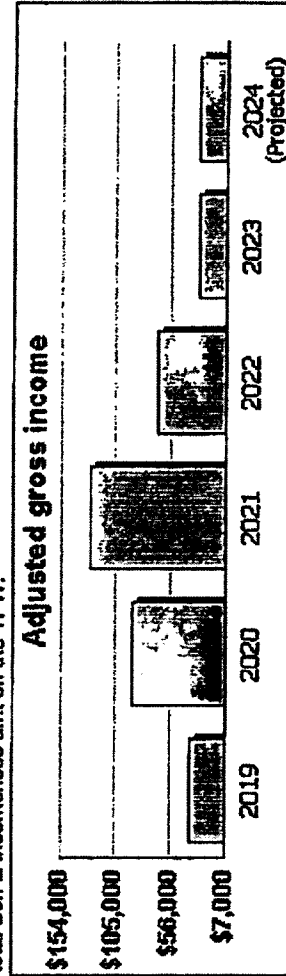
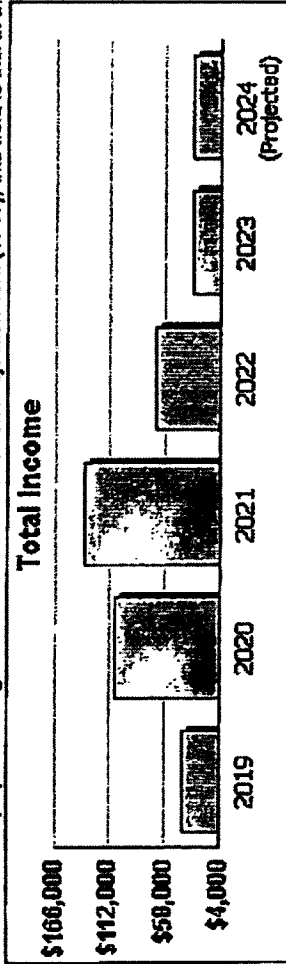
	2022	2023	2022	2023
	Taxable Income	Tax Due	Taxable Income	Tax Due
Ordinary income	47,858	22.0%	13,903	12.0%
Capital income		%		%
Capital - Sec. 1250		%		%
Capital - Sec. 1202		%		%

Name **STEVEN P. VAN GORDEN**

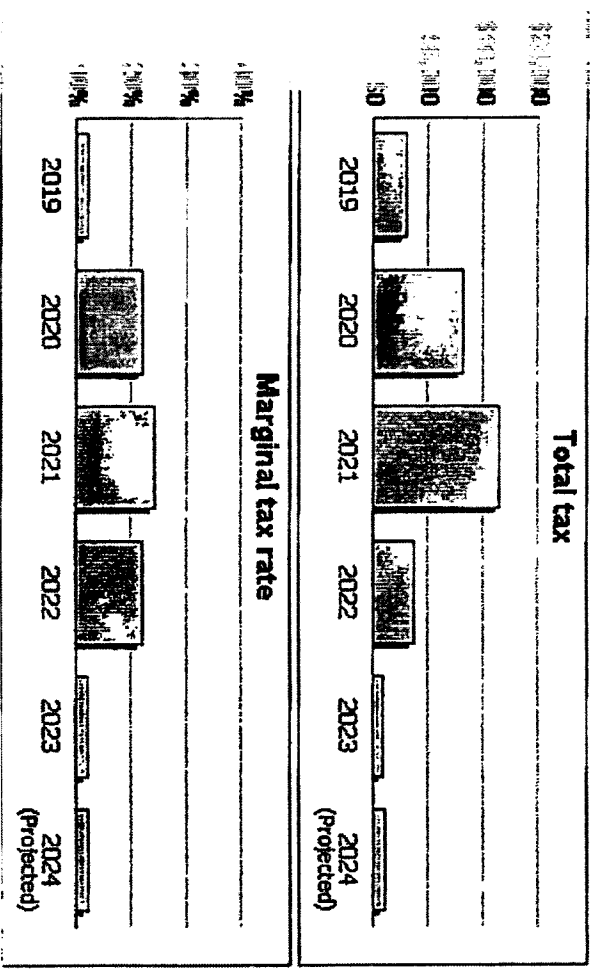
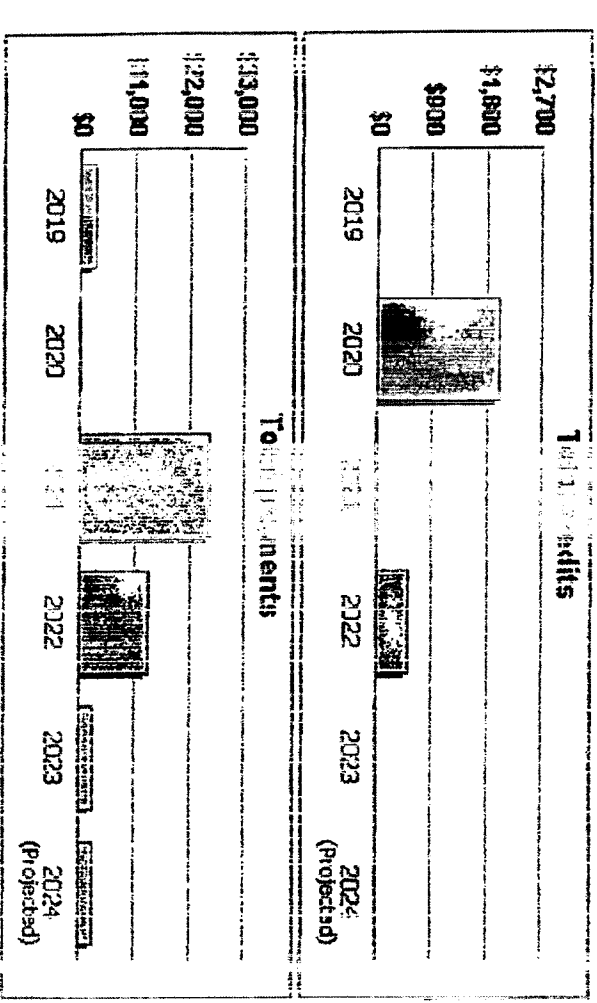
Taxpayer Identification Number

	2019	2020	2021	2022	2023	2024 Projected
	SGL	SGL	SGL	SGL	SGL	SGL
Filing Status						
Salaries and wages	24,303		45,408	37,354	16,000	16,000
Interest income		144			366	366
Dividend income						
Business income/loss	13,147	39,400				
Capital gains/losses			-3,000		-3,000	-3,000
Other gains/losses						
IRA distributions, pensions, annuities	2,605		216			
Rent, royalty, farm rental income						
Partnership/S corp income			94,981	36,822	17,863	17,863
Estate or trust income						
Farm income/loss						
Other income/loss						
Total income	40,055	105,968	137,605	66,948	31,229	31,229
Total adjustments	2,069	15,718	9,550			
Adjusted gross income	37,986	90,250	128,055	66,948	31,229	31,229
Allowable itemized deductions	529	1,307	4,060	7,666	893	893
Standard deduction	12,200	12,400	12,550	12,950	13,850	14,600
Itemized or standard deduction taken	12,200	12,400	12,550	12,950	13,850	14,600
Exemptions						
Taxable income before Qual Bus Inc Ded	23,608	77,850	115,505	53,998	17,379	16,629
Qual Bus Inc Ded		15,570	18,996	6,140	3,476	
Taxable income	23,608	62,280	96,509	47,858	13,903	16,629

\* Amts in the projected col generate from the federal Tax Projection Wrk (TPW); this field is incl in the total Sch E income/loss amt on the TPW.



Item	2019	2020	2021	2022	2023	2024 Projected
Variable income	609	62,280	509	47,858	13,903	16,629
Tax on taxable income and Form 8962	641	9,491	187	6,150	1,451	1,763
Alternative minimum tax		2,000		500		
Total credits						
Fed. tax liability	641	7,491	187	5,650	1,451	1,763
Self-employment taxes	853	5,567				
Other taxes	261		122	190		
Total tax	1,760	13,058	309	5,840	1,451	1,763
Income tax withheld	987		043	13,600	2,610	2,610
Estimated tax payments			120			
Other payments						
Total payments	987		163	13,600	2,610	2,610
Total due/refund	773	13,058	854	-7,760	-1,159	-847
Refundable tax credits						
Refund applied to estimated tax payments						
Refund received			854	-7,760	-1,159	-847
Marital tax rate	2.0%	22.0%	4.0%	22.0%	12.0%	12.0%
Effective tax rate	0.0%	21.0%	9.0%	12.0%	10.0%	11.0%



Form **1040** | **Reconciliation Worksheet - Taxable Income & Tax** | **2023**

Name **STEVEN P. VAN GORDEN** Taxpayer Identification Number

Tax brackets are rates applied to specific levels of taxable income. Various rates apply to different portions of the total taxable income. Type of income, further determines the rate applied. Marginal Tax Rate is the tax paid on the highest level of taxable income. This worksheet details how tax is calculated on ordinary income and capital gain income, the percentage of taxable income, marginal tax rate and the tax method used.

Filing Status Single Tax Pct Total Tax (in 27) divided Total Taxable Income (in 19) 10.0%  
 Tax Method Tax tables

Tax using ordinary and capital gains rates exceeds tax using only ordinary rates. Taxable income is taxed only using ordinary rates:  
 Tax using capital gains rates Tax using Ordinary rates Tax savings

	Taxable Amount	Marginal Tax Rate	Tax on Taxable Income	Marginal Tax Rate - Income Range	Amount of Income to Next Tax Bracket
Ordinary Income	13,903	12.0%	1,451	\$11,000 - \$44,725	30,822
Capital Income		%			
Capital Income - 1250		%			
Capital Income - 1202		%			

\*Tax on taxable ordinary income under \$100,000 is determined using IRS Tax Tables that impose the same amount of tax on taxable income within \$50 intervals. Therefore, the column (b) Tax may not be calculated as column (a) times the applicable line tax rate.

**Income taxed at ordinary rates**

	(a) Taxable Income	(b) Tax*
1. 10% rate Maximum taxable income per this bracket: \$11,000	1a. 11,000	1b. 1,103
2. 12% rate Maximum taxable income per this bracket: \$33,725	2a. 2,903	2b. 348
3. 22% rate	3a.	3b.
4. 24% rate	4a.	4b.
5. 32% rate	5a.	5b.
6. 35% rate	6a.	6b.
7. 37% rate	7a.	7b.
8. Total ordinary taxable income and ordinary tax. Add lines 1 through 7	8a. 13,903	8b. 1,451

**Income taxed at capital gains rates**

9. 0% capital gains rate	9a.	9b.
10. 15% capital gains rate	10a.	10b.
11. 20% capital gains rate	11a.	11b.
12. 25% capital gains rate Unrecaptured Section 1250 Gain	12a.	12b.
13. 28% capital gains rate Small business stock, collectibles	13a.	13b.
14. Total taxable capital gains and capital gains tax. Add lines 9 through 13	14a.	14b.

**Total taxable income**

15. Total ordinary taxable income. Enter the amount from line 8a.	15. 13,903
16. Total capital gains taxable income. Enter the amount from line 14a.	16.
17. Add lines 15 and 16.	17. 13,903
18. Enter the net foreign exclusion amount from the Foreign Earned Income Tax Worksheet, line 2c.	18.
19. Taxable income reported on 1040/1040SR, line 15, (1040NR, line 15). Subtract line 18 from line 17.	19. 13,903

**Total tax**

20. Total ordinary tax. Enter the amount from line 8b.	20. 1,451
21. Total capital gains tax. Enter the amount from line 14b.	21.
22. Tax on child's interest and dividend.	22.
23. Tax on lump-sum distribution.	23.
24. Other taxes.	24.
25. Add lines 20 through 24.	25. 1,451
26. Enter the tax allocated to the net exclusion amount from the Foreign Earned Income Tax Worksheet, line 5.	26.
27. Total tax reported on 1040/1040SR, line 16, (1040NR, line 16). Subtract line 26 from line 25.	27. 1,451