

Electronic Filing Instructions for your 2024 Federal Tax Return

Important: Your taxes are not finished until all required steps are completed.



Thomas a & Mary L Watson
57 Sunset Hill Dr
Monroe, CT 06468-3332

Balance Due/Refund	You've chosen to pay for your federal balance due of \$753.00 by credit card. Double-check your credit card statement to make sure your payment was received by the IRS. This will help you avoid any possible interest and/or penalties. And since you paid by credit card, you don't need to mail a payment to the Internal Revenue Service.		
What You Need to Keep	Your Electronic Filing Instructions (this form) A copy of your federal return		
2024 Federal Tax Return Summary	Adjusted Gross Income	\$	42,572.00
	Taxable Income	\$	10,272.00
	Total Tax	\$	753.00
	Payment Due	\$	753.00
	Effective Tax Rate		1.77%



Hi Thomas and Mary L,

We just want to thank you for using TurboTax this year! It's our goal to make your taxes easy and accurate, year after year.

With TurboTax Live Premium:

Your Head Start On Next Year:

When you come back next year, taxes will be so easy! All your information will be saved and ready to transfer in to your new return. We'll ask you questions about what changed since we last talked, and we'll be ready to get you the credits and deductions you deserve, no matter what life throws at you.

Here's the final wrap up for your 2024 taxes:

Your federal balance due is: \$ 753.00

Your Guarantee of Accuracy:

Breathe easy. The calculations on your return are backed with our 100% Accuracy Guarantee.

- We double checked your return for errors along the way.
- We helped with step-by-step guidance to get your answers on the right IRS forms.
- We asked you specific questions related to your business and found all the related deductions.
- We made sure you didn't miss a deduction even if something in your life changed, like a new job, new house - or more kids!

Also included:

- We provide the Audit Support Center free of charge, in the unlikely event you get audited.

Many happy returns from TurboTax.

For the year Jan. 1–Dec. 31, 2024, or other tax year beginning _____, 2024, ending _____, 20 _____

See separate instructions.

Your first name and middle initial Thomas a		Last name Watson		Your social security number 035 34 7948	
If joint return, spouse's first name and middle initial Mary L		Last name Watson		Spouse's social security number 038 30 6666	
Home address (number and street). If you have a P.O. box, see instructions. 57 Sunset Hill Dr				Apt. no.	
City, town, or post office. If you have a foreign address, also complete spaces below. Monroe			State CT	ZIP code 064683332	
Foreign country name		Foreign province/state/county		Foreign postal code	
Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse					

Filing Status

Check only one box.

☐ Single ☒ Married filing jointly (even if only one had income) ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

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: _____

☐ If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required): _____

Digital Assets

At any time during 2024, 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, 1960 ☐ Are blind
Spouse: ☒ Was born before January 2, 1960 ☐ Is blind

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	
(1) First name	Last name			Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.
If you did not get a Form W-2, see instructions.

1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	
b	Household employee wages not reported on Form(s) W-2	1b	
c	Tip income not reported on line 1a (see instructions)	1c	
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
e	Taxable dependent care benefits from Form 2441, line 26	1e	
f	Employer-provided adoption benefits from Form 8839, line 29	1f	
g	Wages from Form 8919, line 6	1g	
h	Other earned income (see instructions)	1h	
i	Nontaxable combat pay election (see instructions)	1i	
z	Add lines 1a through 1h	1z	
2a	Tax-exempt interest	2a	0.
3a	Qualified dividends	3a	474.
4a	IRA distributions	4a	
5a	Pensions and annuities	5a	
6a	Social security benefits	6a	40,060.
c	If you elect to use the lump-sum election method, check here (see instructions)		<input type="checkbox"/>
b	Taxable interest	2b	582.
b	Ordinary dividends	3b	719.
b	Taxable amount	4b	3,300.
b	Taxable amount	5b	14,008.
b	Taxable amount	6b	11,790.

Attach Schedule B if required.

7	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	7	12,173.
8	Additional income from Schedule 1, line 10	8	
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9	42,572.
10	Adjustments to income from Schedule 1, line 26	10	
11	Subtract line 10 from line 9. This is your adjusted gross income	11	42,572.
12	Standard deduction or itemized deductions (from Schedule A)	12	32,300.
13	Qualified business income deduction from Form 8995 or Form 8995-A	13	
14	Add lines 12 and 13	14	32,300.
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15	10,272.

Standard DeductionSee *Standard Deduction Chart* on the last page of this form.**Tax and Credits**

16	Tax (see instructions). Check if any from: 1 <input type="checkbox"/> Form(s) 8814 2 <input type="checkbox"/> Form(s) 4972 3 <input type="checkbox"/> _____	16	753.
17	Amount from Schedule 2, line 3	17	
18	Add lines 16 and 17	18	753.
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	753.
23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	0.
24	Add lines 22 and 23. This is your total tax	24	753.

Payments

25	Federal income tax withheld from:		
a	Form(s) W-2	25a	
b	Form(s) 1099	25b	
c	Other forms (see instructions)	25c	
d	Add lines 25a through 25c	25d	
26	2024 estimated tax payments and amount applied from 2023 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	

If you have a qualifying child, attach Sch. EIC.

Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34																											
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	35a																											
	Direct deposit? See instructions. b Routing number <table><tr><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td></tr></table> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings d Account number <table><tr><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td><td>x</td></tr></table>			x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	
x	x	x	x	x	x	x	x	x	x																					
x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x															
	36	Amount of line 34 you want applied to your 2025 estimated tax	36																											
Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to <i>www.irs.gov/Payments</i> or see instructions	37	753.																										
	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 <input type="checkbox"/> Yes . Complete below. <input checked="" type="checkbox"/> No							
	Designee's name	Phone no.	Personal identification number (PIN) <table><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>					

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	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <table><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>						
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 inst.) <table><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>							
	Phone no. (603) 459-4052		Email address							

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed
	Firm's name Self-Prepared				Phone no.
	Firm's address				Firm's EIN

Standard Deduction Chart*

Add the number of boxes checked in the "Age/Blindness" section of *Standard Deduction* on page 1 _____

IF your filing status is. . .	AND the number of boxes checked is. . .	THEN your standard deduction is. . .
Single	1	\$16,550
	2	18,500
Married filing jointly	1	\$30,750
	2	32,300
	3	33,850
	4	35,400
Qualifying surviving spouse	1	\$30,750
	2	32,300
Head of household	1	\$23,850
	2	25,800
Married filing separately**	1	\$16,150
	2	17,700
	3	19,250
	4	20,800

*Don't use this chart if someone can claim you (or your spouse if filing jointly) as a dependent, your spouse itemizes on a separate return, or you were a dual-status alien. Instead, see instructions.

**You can check the boxes for your spouse if your filing status is married filing separately and your spouse had no income, isn't filing a return, and can't be claimed as a dependent on another person's return.

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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 for instructions and the latest information.

OMB No. 1545-0074

2024

Attachment
Sequence No. **12**

Name(s) shown on return

Thomas a & Mary L Watson

Your social security number

035-34-7948

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes ☐ No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b .	66,764.	67,728.		-964.
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	1,971,007.	2,322,250.	362,107.	10,864.
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back				7 9,900.

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

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b .				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked	26,945.	24,675.	3.	2,273.
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions. See the instructions				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on the back				15 2,273.

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

Schedule D (Form 1040) 2024

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	12,173.
<ul style="list-style-type: none"> • 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? <input checked="" type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> 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 you are not filing Form 4952? <input checked="" type="checkbox"/> 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. <input type="checkbox"/> 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: <div style="display: flex; align-items: center;"> <ul style="list-style-type: none"> • The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500) <div style="font-size: 3em; margin: 0 10px;">}</div> <div style="flex-grow: 1; border-bottom: 1px solid black; position: relative;"> <div style="position: absolute; right: -10px; top: -5px;">.</div> </div> </div>	21	()
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? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. <input type="checkbox"/> No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Sales and Other Dispositions of Capital Assets

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 for instructions and the latest information.

Name(s) shown on return

Thomas a & Mary L Watson

Social security number or taxpayer identification number

035-34-7948

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 <i>Column (e)</i> 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	
	SOFI TECHNOLOGIES INC COM 1197	01/05/24	01/22/24	9,971.	9,971.	W	0.	0.
	SOFI TECHNOLOGIES INC COM 1197	01/05/24	01/30/24	10,222.	8,774.			1,448.
	SOFI TECHNOLOGIES INC COM 803	01/05/24	01/30/24	6,858.	6,689.			169.
	SOFI TECHNOLOGIES INC COM 1803	01/19/24	01/30/24	15,397.	13,216.			2,181.
	SOFI TECHNOLOGIES INC COM 1200	01/23/24	01/30/24	10,248.	9,396.			852.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	01/31/24	8,262.	8,390.	W	128.	0.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	01/31/24	8,302.	8,390.	W	88.	0.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	01/31/24	8,092.	8,390.	W	298.	0.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	02/01/24	7,920.	8,390.	W	470.	0.
	CALL (SOFI) SOFI TECHNOLOGIES FE 10	02/02/24	02/02/24	163.	0.			163.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	02/05/24	7,550.	8,323.	W	773.	0.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	02/05/24	7,550.	8,308.	W	758.	0.
	SOFI TECHNOLOGIES INC COM 1000	01/30/24	02/05/24	7,550.	8,363.	W	813.	0.
	SOFI TECHNOLOGIES INC COM 1003	01/30/24	02/05/24	7,573.	8,415.	W	843.	1.
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).				115,658.	115,015.		4,171.	4,814.

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.

Sales and Other Dispositions of Capital Assets

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 for instructions and the latest information.

Name(s) shown on return

Thomas a & Mary L Watson

Social security number or taxpayer identification number

035-34-7948

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 <i>Column (e)</i> 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	
	SOFI TECHNOLOGIES INC COM 997	01/30/24	02/05/24	7,527.	8,285.	W	758.	0.
	SOFI TECHNOLOGIES INC COM 3	01/30/24	02/07/24	23.	25.	W	2.	0.
	SOFI TECHNOLOGIES INC COM 4997	01/30/24	02/07/24	37,927.	41,620.	W	3,693.	0.
	SOFI TECHNOLOGIES INC COM 100	01/30/24	02/16/24	841.	840.			1.
	SOFI TECHNOLOGIES INC COM 3	01/30/24	02/16/24	25.	25.			0.
	SOFI TECHNOLOGIES INC COM 897	01/30/24	02/16/24	7,553.	7,530.			23.
	CALL (SOFI) SOFI TECHNOLOGIES FE 10	02/15/24	02/16/24	-7.	0.			-7.
	CALL (SOFI) SOFI TECHNOLOGIES FE 10	02/15/24	02/16/24	-7.	0.			-7.
	CALL (SOFI) SOFI TECHNOLOGIES FE 1	02/16/24	02/16/24	11.	0.			11.
	CALL (SOFI) SOFI TECHNOLOGIES FE 10	02/16/24	02/16/24	114.	0.			114.
	SOFI TECHNOLOGIES INC COM 1200	01/30/24	02/20/24	10,098.	10,034.			64.
	KINDER MORGAN INC COM USD0.01 56.818	05/11/23	02/21/24	982.	908.			74.
	KINDER MORGAN INC COM USD0.01 1000	06/23/23	02/21/24	17,275.	15,879.			1,396.
	KINDER MORGAN INC COM USD0.01 48.637	08/11/23	02/21/24	840.	855.			-15.
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).				83,202.	86,001.		4,453.	1,654.

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.

Sales and Other Dispositions of Capital Assets

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 for instructions and the latest information.

Name(s) shown on return

Thomas a & Mary L Watson

Social security number or taxpayer identification number

035-34-7948

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 <i>Column (e)</i> 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	
	KINDER MORGAN INC COM USD0.01 53.226	11/13/23	02/21/24	919.	880.			39.
	KINDER MORGAN INC COM USD0.01 19.397	02/13/24	02/21/24	335.	322.			13.
	SOFI TECHNOLOGIES INC COM 2803	01/30/24	02/27/24	24,540.	23,316.			1,224.
	SOFI TECHNOLOGIES INC COM 197	02/16/24	02/27/24	1,725.	1,653.			72.
	SOFI TECHNOLOGIES INC COM 803	02/16/24	03/06/24	5,944.	6,737.	W	794.	1.
	SOFI TECHNOLOGIES INC COM 600	02/20/24	03/06/24	4,441.	5,022.	W	581.	0.
	SOFI TECHNOLOGIES INC COM 897	02/21/24	03/06/24	6,639.	7,320.			-681.
	SOFI TECHNOLOGIES INC COM 1403	02/20/24	03/08/24	10,789.	12,823.			-2,034.
	SOFI TECHNOLOGIES INC COM 697	02/21/24	03/08/24	5,360.	5,688.			-328.
	SOFI TECHNOLOGIES INC COM 3	02/21/24	08/29/24	25.	24.			1.
	ARGO BLOCKCHAIN PLC SPON ADS EAC 135	07/23/24	09/30/24	171.	216.			-45.
	600.00 SOFI TECHNOLOGIES INC	02/20/24	02/22/24	4,980.	5,034.	W	54.	0.
	100.00 SOFI TECHNOLOGIES INC	02/22/24	03/06/24	750.	993.	W	243.	0.
	3100.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	22,659.	27,309.	W	4,650.	0.
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).				89,277.	97,337.		6,322.	-1,738.

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Sales and Other Dispositions of Capital Assets

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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 <i>Column (e)</i> 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	
	3100.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	22,041.	27,387.	W	5,347.	1.
	3100.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	22,227.	27,409.	W	5,182.	0.
	3200.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	23,136.	28,143.	W	5,012.	5.
	3200.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	23,232.	28,264.	W	5,033.	1.
	3200.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	23,778.	28,745.	W	4,968.	1.
	3200.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	24,162.	29,054.	W	4,904.	12.
	3300.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	24,783.	29,881.	W	5,099.	1.
	3200.00 SOFI TECHNOLOGIES INC	VARIOUS	03/06/24	23,842.	28,987.	W	5,145.	0.
	2500.00 SOFI TECHNOLOGIES INC	VARIOUS	03/07/24	18,499.	22,434.	W	3,935.	0.
	2500.00 SOFI TECHNOLOGIES INC	VARIOUS	03/07/24	18,552.	19,106.	W	890.	336.
	4000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/08/24	30,601.	35,422.	W	4,824.	3.
	2500.00 SOFI TECHNOLOGIES INC	VARIOUS	03/11/24	19,224.	23,631.	W	4,407.	0.
	2557.00 SOFI TECHNOLOGIES INC	VARIOUS	03/11/24	19,637.	21,190.	W	1,552.	-1.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/11/24	38,603.	44,396.	W	5,793.	0.
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).				332,317.	394,049.		62,091.	359.

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Thomas a & Mary L Watson

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035-34-7948

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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 <i>Column (e)</i> 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	
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/12/24	37,651.	44,542.	W	6,891.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/12/24	37,603.	43,892.	W	6,289.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/12/24	37,749.	44,033.	W	6,284.	0.
	6000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/12/24	45,179.	51,467.	W	6,288.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/13/24	37,224.	43,903.	W	6,679.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/13/24	37,349.	44,120.	W	6,771.	0.
	4000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/13/24	29,960.	35,817.	W	5,858.	1.
	1000.00 SOFI TECHNOLOGIES INC	03/09/24	03/18/24	6,960.	9,328.	W	2,369.	1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/18/24	6,940.	9,513.	W	2,573.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/18/24	6,940.	9,611.	W	2,671.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/18/24	6,992.	9,859.	W	2,867.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/18/24	6,942.	10,096.	W	3,155.	1.
	100.00 SOFI TECHNOLOGIES INC	VARIOUS	03/18/24	709.	1,126.	W	417.	0.
	10.00 SOFI TECHNOLOGIES INC	02/24/24	03/19/24	69.	109.	W	40.	0.
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).				298,267.	357,416.		59,152.	3.

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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 <i>Column (e)</i> 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	
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/20/24	6,970.	10,087.	W	3,117.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/20/24	6,980.	9,957.	W	2,977.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/20/24	7,000.	10,120.	W	3,120.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/21/24	36,949.	45,581.	W	8,632.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/21/24	37,053.	45,767.	W	8,714.	0.
	178.00 SOFI TECHNOLOGIES INC	VARIOUS	03/21/24	1,324.	1,974.	W	650.	0.
	1000.00 SOFI TECHNOLOGIES INC	03/09/24	03/25/24	7,410.	10,032.	W	2,623.	1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/25/24	7,430.	9,879.	W	2,449.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/25/24	7,512.	9,943.	W	2,431.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/25/24	7,562.	9,959.	W	2,398.	1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/26/24	7,360.	10,213.	W	2,853.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/27/24	7,250.	10,170.	W	2,920.	0.
	1100.00 SOFI TECHNOLOGIES INC	VARIOUS	03/27/24	7,986.	11,197.	W	3,211.	0.
	2000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/27/24	14,660.	19,997.	W	5,338.	1.
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).				163,446.	214,876.		51,433.	3.

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						(f) Code(s) from instructions	(g) Amount of adjustment	
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/27/24	7,280.	10,092.	W	2,812.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/27/24	7,325.	9,867.	W	2,543.	1.
	2000.00 SOFI TECHNOLOGIES INC	VARIOUS	03/28/24	14,840.	19,744.	W	4,904.	0.
	314.00 SOFI TECHNOLOGIES INC	VARIOUS	04/01/24	2,295.	3,312.	W	1,017.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/01/24	35,899.	43,476.	W	7,577.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/01/24	35,849.	43,670.	W	7,821.	0.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/01/24	35,899.	43,516.	W	7,616.	-1.
	700.00 SOFI TECHNOLOGIES INC	VARIOUS	04/01/24	5,040.	7,091.	W	2,051.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/01/24	7,220.	9,855.	W	2,636.	1.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/02/24	21,389.	27,502.	W	6,112.	-1.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/02/24	21,419.	27,400.	W	5,980.	-1.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/02/24	21,359.	27,647.	W	6,288.	0.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/02/24	21,449.	27,501.	W	6,051.	-1.
	5000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/03/24	37,399.	42,878.	W	5,531.	52.
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).				274,662.	343,551.		68,939.	50.

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						(f) Code(s) from instructions	(g) Amount of adjustment	
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/03/24	22,199.	27,401.	W	5,202.	0.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/04/24	22,890.	27,619.	W	4,730.	1.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/04/24	22,919.	27,296.	W	4,386.	9.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/04/24	22,808.	27,363.	W	4,554.	-1.
	3100.00 SOFI TECHNOLOGIES INC	VARIOUS	04/04/24	23,281.	28,135.	W	4,854.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/04/24	7,420.	9,882.	W	2,462.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/04/24	7,390.	9,972.	W	2,582.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/05/24	7,420.	10,052.	W	2,632.	0.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/08/24	22,560.	27,810.	W	5,250.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/09/24	7,910.	9,937.	W	2,027.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/09/24	7,870.	9,740.	W	1,870.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/09/24	7,881.	9,766.	W	1,884.	-1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/09/24	7,862.	9,694.	W	1,833.	1.
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/10/24	22,544.	27,133.	W	4,589.	0.
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).				212,954.	261,800.		48,855.	9.

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.

Sales and Other Dispositions of Capital Assets

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 for instructions and the latest information.

Name(s) shown on return

Thomas a & Mary L Watson

Social security number or taxpayer identification number

035-34-7948

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 <i>Column (e)</i> 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	
	3000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/10/24	22,544.	27,668.	W	5,124.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/22/24	7,210.	10,023.	W	2,813.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/22/24	7,195.	10,363.	W	3,168.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/22/24	7,260.	10,318.	W	3,058.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/22/24	7,220.	10,301.	W	3,081.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/23/24	7,453.	10,269.	W	2,817.	1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/24/24	7,470.	10,049.	W	2,579.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/25/24	7,350.	9,987.	W	2,638.	1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/25/24	7,450.	10,093.	W	2,643.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/25/24	7,490.	10,016.	W	2,526.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/26/24	7,820.	9,838.	W	2,019.	1.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	04/26/24	7,990.	9,705.	W	1,715.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	05/13/24	7,255.	8,911.	W	1,656.	0.
	1000.00 SOFI TECHNOLOGIES INC	VARIOUS	05/14/24	7,500.	8,905.	W	1,405.	0.
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).				119,207.	156,446.		37,242.	3.

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

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

Social security number or taxpayer identification number

Thomas a & Mary L Watson

035-34-7948

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

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

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

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

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

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

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> 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	
	KINDER MORGAN INC COM USD0.01 505.132	11/19/21	01/05/24	9,150.	7,269.			1,881.
	KINDER MORGAN INC COM USD0.01 34.212	02/11/22	01/05/24	620.	545.			75.
	KINDER MORGAN INC COM USD0.01 33.989	05/12/22	01/05/24	616.	581.			35.
	KINDER MORGAN INC COM USD0.01 426.667	06/10/22	01/05/24	7,728.	7,528.			200.
	KINDER MORGAN INC COM USD0.01 73.333	06/10/22	02/21/24	1,267.	1,294.	W	3.	-24.
	KINDER MORGAN INC COM USD0.01 41.623	08/11/22	02/21/24	719.	731.			-12.
	KINDER MORGAN INC COM USD0.01 42.262	11/11/22	02/21/24	730.	753.			-23.
	KINDER MORGAN INC COM USD0.01 300	12/16/22	02/21/24	5,182.	5,032.			150.
	KINDER MORGAN INC COM USD0.01 44.704	02/13/23	02/21/24	772.	791.			-19.
	KINDER MORGAN INC COM USD0.01 0.9	06/10/22	03/21/24	16.	15.			1.
	KINDER MORGAN INC COM USD0.01 8	06/10/22	03/21/24	145.	136.			9.
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).				26,945.	24,675.		3.	2,273.

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.

Electronic Filing Instructions for your 2024 Connecticut Tax Return

Important: Your taxes are not finished until all required steps are completed.



Thomas A & Mary L Watson
57 SUNSET HILL DR
MONROE, CT 06468-3332

Balance Due/Refund	Your Connecticut state tax return (Form CT-1040) shows that you have no balance due nor a refund due to you: DO NOT mail a payment or expect to receive a refund from the Connecticut Department of Revenue.		
No Signature Document Needed	No signature form is required since you signed your return electronically.		
What You Need to Keep	Your Electronic Filing Instructions (this form) A copy of your state and federal returns		
2024 Connecticut Tax Return Summary	Taxable Income	\$	15,124.00
	Total Tax	\$	0.00
	No Refund or Amount Due	\$	0.00

Form CT-1040 Required Fields

The following fields are required to be automatically populated or completed for taxpayers to continue filing, or must be completed in response to the selection of other fields.

Required to be Automatically-Populated Fields

Each page of each form submitted to DRS must include the following automatically populated fields:

1. **Document Identification Numbers** - Three occurrences of the Document Identification Number (DIN) must be on each page. The QR Code and two DINs must be on each scannable page. (See Document Identification Number and Quick Reference (QR) Code, on Page 4.)
2. **Social Security Number** - The Social Security Number must appear at the top of Form CT-1040, Pages 2, 3, and 4.
3. In addition, the following **Checklist for filing your Connecticut income tax return** must be included when hard copies of the form are printed. Taxpayers should not send the checklist to DRS with the return.

Do not send this sheet with your return.

Checklist for filing your Connecticut income tax return:

1. Be sure that Page 1 of your return is not printed on the back of this sheet.
2. Do not send "Draft" or "Unapproved" versions of your return. This will delay or stop the processing of your return.
3. Do not make manual (hand written or typed) corrections to your return; this is a machine readable return. Changes may only be made by reentering information in your software and re-printing the return.
4. **Do not attach or send copies of forms W-2 or 1099.**
5. Verify that the address lines on the return are correct and proper abbreviations are used.
6. If the Employer or Payer's Federal ID # is not listed on Page 2, Lines 18a through 18e, Column A, **all** withholding claimed will be disallowed and your return will not be successfully processed.
7. Do not attempt to remove or modify the solid boxes that print out on your return. Altering target marks may affect the processing of your return.
8. Do not use this return to change or amend previously filed returns. You must use Form CT-1040X to change or amend a previously filed Connecticut income tax return.
9. Send **all** completed pages of CT-1040, Schedule CT-EITC, Schedule CT-CHET, Supplemental Schedule CT-1040WH, Schedule CT-IT Credit, Schedule CT-PE, Schedule CT-Dependent, and Form CT-6251. Send **all** four pages of your completed return, both pages of your completed CT-EITC schedule, the completed Schedule CT-CHET, and any other supporting schedules.
10. Make check payable to: Commissioner of Revenue Services
11. To ensure proper posting, write your SSN(s) (optional) and "2022 Form CT-1040" on your check.
12. To mail your return, use the following addresses:
 For all tax returns with payment:
 Department of Revenue Services
 PO Box 2977
 Hartford CT 06104-2977
 For refunds and tax returns without payment:
 Department of Revenue Services
 PO Box 2976
 Hartford CT 06104-2976
13. Verify that all fields print completely and any preparer information is filled out and legible before filing this return. If you find any errors, do not make manual changes. Re-enter information in your software and re-print the return.
14. If you wish to directly deposit a refund into a checking or savings bank account, confirm that Lines 25a through 25d have been completed. You **must** enter bank information on both the federal and Connecticut returns for each to be correctly deposited. Alpha characters are not allowed in Routing or Account Number fields.
15. When making payment using Form CT-1040V, **DO NOT** attach copies of your previously filed Form CT-1040.

Do not send this sheet with your return.

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Form CT-1040 - 2024
Connecticut Resident Income Tax Return
(Rev. 12/24)

Page 1 of 4

Other tax year, beginning: and ending:

N	S	Y	FJ	N	MFS	N	HOH	N	QSS			
035	-	34	-	7948	038	-	30	-	6666	•		
THOMAS			A WATSON			N			Dec.			
MARY L			WATSON			N			Dec.			
57 SUNSET HILL DR						N	CT-8379	N	CT-2210	N	CT-19IT	
						USA	N	CT-1040 CRC	N	Federal Form 1310	N	Schedule CT-Dependent
MONROE			CT			06468			-	3332	N	Access Health CT: Checking this box authorizes DRS to notify Access Health CT of your interest in the health coverage options that may be available.

1. Federal adjusted gross income (from federal Form 1040, Line 11, or federal Form 1040-SR, Line 11)	1.	42572
2. Additions to federal adjusted gross income (from Schedule 1, Line 38)	2.	0
3. Add Line 1 and Line 2	3.	42572
4. Subtractions from federal adjusted gross income (from Schedule 1, Line 50)	4.	27448
5. Connecticut adjusted gross income: Line 4 subtracted from Line 3.	5.	15124
6. Income tax	6.	0
7. Credit for income taxes paid to qualifying jurisdictions (from Schedule 2, Line 59)	7.	0
8. Line 7 subtracted from Line 6. If Line 7 is greater than Line 6, "0" is entered.	8.	0
9. Connecticut alternative minimum tax (from Form CT-6251)	9.	0
10. Add Line 8 and Line 9.	10.	0
11. Credit for property taxes paid on your primary residence, motor vehicle, or both (from Schedule 3, Line 68)	11.	300
12. Line 11 subtracted from Line 10. If less than zero, "0" is entered.	12.	0
13. Total allowable credits (from Schedule CT-IT Credit, Part 1, Line 11)	13.	0
14. Connecticut income tax: Line 13 subtracted from Line 12. If less than zero, "0" is entered.	14.	0
15. Individual use tax (from Schedule 4, Line 69). If no tax is due, "0" is entered.	15.	0
16. Total tax: Add Line 14 and Line 15.	16.	0



10401224V011555

Clip check here. Do not use staples. Do not send Forms W-2 or 1099, or Schedules CT K-1.

Form CT-1040, Page 2 of 4

10401224V021555



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17. Amount from Line 16

17. 0

Forms W-2, W-2G, and 1099 Information

Col. A - Employer or Payer's Fed. ID #	Col. B - CT Wages, Tips, etc.	Col. C - CT Income Tax Withheld
18a. -	• 0	0
18b. -	• 0	0
18c. -	• 0	0
18d. -	• 0	0
18e. -	• 0	0

18f. Additional Connecticut withholding (from Supplemental Schedule CT-1040WH, Line 3) 18f. 0

18. Total Connecticut income tax withheld: Amounts in Column C.	18.	0
19. All 2024 estimated tax payments and any overpayments applied from a prior year	19.	0
20. Payments made with Form CT-1040 EXT	20.	0
20a. Earned income tax credit (from Schedule CT-EITC, Line 16).	20a.	0
20b. Claim of right credit (from Form CT-1040 CRC, Line 6).	20b.	0
20c. Pass-through entity tax credit: (from Schedule CT-PE, Line 1). Schedule must be attached.	20c.	0
20d. Historic Home Rehabilitation Credit.	20d.	0
21. Total payments and refundable credits: Add Lines 18, 19, 20, 20a, 20b, 20c, and 20d.	21.	0
22. Overpayment: If Line 21 is more than Line 17, Line 17 subtracted from Line 21.	22.	0

23. Amount of Line 22 you want applied to your 2025 estimated tax	23.	0
24. Amount of Line 22 you want applied as a CHET contribution (from Schedule CT-CHET, Line 4)	24.	0
24a. Total contributions of refund to designated charities (from Schedule 5, Line 70)	24a.	0

25. **Refund:** Lines 23, 24, and 24a subtracted from Line 22. **25.** 0

If you have not elected to direct deposit, a refund check will be issued and processing may be delayed.

25a. Acct. type N Ck. N Sv. 25b. Rout. # 25c. Acct. #

25d. Refund going to a bank account outside the U.S. 25d. N

26. Tax due: If Line 17 is more than Line 21, Line 21 subtracted from Line 17.	26.	0
27. If late: Penalty entered. Line 26 multiplied by 10% (.10).	27.	0
28. If late: Interest entered.		
Line 26 multiplied by number of months or fraction of a month late, then by 1% (.01).	28.	0
29. Interest on underpayment of estimated tax (from Form CT-2210)	29.	0
30. Total amount due: Add Lines 26 through 29.	30.	0.00

Declaration: I declare under penalty of law that I have examined this return and all accompanying schedules and statements, including reporting and payment of any use tax due, and, to the best of my knowledge and belief, it is true, complete, and correct. I understand the penalty for willfully delivering a false return or document to DRS is a fine of not more than \$5,000, or imprisonment for not more than five years, or both. The declaration of a paid preparer other than the taxpayer is based on all information of which the preparer has any knowledge.

Your signature		Date	Home/cell telephone number
•		•	6034594052
Spouse's signature (if joint return)		Date	Daytime telephone number
•		•	•
Paid preparer's signature	Date	Telephone number	Paid Preparer's PTIN
• SELF-PREPARED	•	•	
Paid preparer's name			FEIN
Firm's name, address and ZIP code			Self-employed
• -			N

Third Party Designee - Complete the following to authorize DRS to contact another person about this return.

Designee's name	Telephone number	Personal identification number (PIN)
•	•	•

10401224V021555

Sign Here

Keep a copy for your records.

Form CT-1040, Page 3 of 4

10401224V031555



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Schedule 1 - Modifications to Federal Adjusted Gross Income

31. Interest on state and local government obligations other than Connecticut	31.	0
32. Mutual fund exempt-interest dividends from non-Connecticut state or municipal government obligations	32.	0
33. Taxable amount of lump-sum distributions from qualified plans not included in federal adjusted gross income	33.	0
34. Beneficiary's share of Connecticut fiduciary adjustment: Entered only if greater than zero.	34.	0
35. Loss on sale of Connecticut state and local government bonds	35.	0
36. Section 168(k) federal bonus depreciation deduction allowed for property placed in service during this year.	36.	0
36a. 80% of Section 179 federal deduction.	36a.	0
37. Other - specify •	37.	0
38. Total additions: Add Lines 31 through 37.	38.	0
39. Interest on U.S. government obligations	39.	0
40. Exempt dividends from certain qualifying mutual funds derived from U.S. government obligations	40.	0
41. Social Security benefit adjustment (from Social Security Benefit Adjustment Worksheet)	41.	11790
42. Refunds of state and local income taxes	42.	0
43. Tier 1 and Tier 2 railroad retirement benefits and supplemental annuities	43.	0
44. Military retirement pay	44.	0
45. 50% of income received from Connecticut Teachers' Retirement System	45.	0
46. Beneficiary's share of Connecticut fiduciary adjustment: Entered only if less than zero.	46.	0
47. Gain on sale of Connecticut state and local government bonds	47.	0
48. CHET contributions made in 2024 or an excess carried forward from a prior year	48.	0
48a. 25% of Section 168(k) federal bonus depreciation deduction added back in preceding four years.	48a.	0
48b. Pension or annuity income.	48b.	15658
48c. Ordinary and necessary business expenses for taxpayers licensed under Chapter 420f or 420h that are not claimed for federal income tax purposes.	48c.	0
48d. Achieving Better Life Experience (ABLE)	48d.	0
49. Other - specify •	49.	0
50. Total subtractions: Add Lines 39 through 49.	50.	27448

Schedule 2 - Credit for Income Taxes Paid to Qualifying Jurisdictions

51. Modified Connecticut adjusted gross income	51.	0
	Col. A	Col. B
52. Qualifying jurisdiction's name and two-letter code	52.	
53. Non-Connecticut income included on Line 51 and reported on a qualifying jurisdiction's income tax return (from Schedule 2 worksheet)	53.	0
54. Line 53 divided by Line 51	54.	0.0000
55. Income tax liability: Line 11 subtracted from Line 6.	55.	0
56. Line 54 multiplied by Line 55	56.	0
57. Income tax paid to a qualifying jurisdiction	57.	0
58. Lesser of Line 56 or Line 57	58.	0
59. Total credit: Add Line 58, all columns.	59.	0

10401224V031555

Form CT-1040, Page 4 of 4

10401224V041555



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Schedule 3 - Property Tax Credit

<i>Qualifying Property</i>		<i>Primary Residence</i>		<i>Auto 1</i>		<i>Auto 2</i>
Name of Connecticut Tax Town or District •		MONROE •			•	
Description of Property •		57 SUNSET •			•	
Date(s) Paid •		02012024 •			•	
		•			•	
Amount Paid	60.	10914	61.	0	62.	0
63. Total property tax paid: Add Lines 60, 61, and 62.					63.	10914
64. Maximum property tax credit allowed					64. •	300
65. Lesser of Line 63 or Line 64.					65. •	300
66. Property tax credit limitation decimal amount: If zero, the amount from Line 65 is entered on Line 68.					66. •	0.00
67. Line 65 multiplied by Line 66.					67. •	0
68. Line 67 subtracted from Line 65.					68.	300

Schedule 4 - Individual Use Tax

69a. Use tax at 1% (from Connecticut Individual Use Tax Worksheet, Section A, Column 7)	69a.	0
69b. Use tax at 6.35% (from Connecticut Individual Use Tax Worksheet, Section B, Column 7)	69b.	0
69c. Use tax at 7.75% (from Connecticut Individual Use Tax Worksheet, Section C, Column 7)	69c.	0
69d. Use tax at 2.99% (from Connecticut Individual Use Tax Worksheet, Section D, Column 7)	69d.	0
69. Individual use tax: Add Lines 69a, 69b, 69c, and 69d.	69. •	0

Schedule 5 - Contributions to Designated Charities

70a. AR	70a.	0
70b. OT	70b.	0
70c. ES/W	70c.	0
70d. BCR	70d.	0
70e. SNS	70e.	0
70f. MR	70f.	0
70g. CBS	70g.	0
70h. MHCIA	70h.	0
70. Total Contributions: Add Lines 70a through 70h.	70.	0

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