

38	Subtract line 37 from line 36. If zero or less, enter -0-	38	
39	Subtract line 38 from line 35. If zero or less, enter -0-	39	
40	Multiply line 39 by 25% (0.25)	40	
If Schedule D, line 18, is zero or blank, skip lines 41 through 43 and go to line 44. Otherwise, go to line 41.			
41	Add lines 21, 22, 30, 33, and 39	41	
42	Subtract line 41 from line 1c	42	
43	Multiply line 42 by 28% (0.28)	43	
44	Figure the tax on the amount on line 21 . If the amount on line 21 is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 21 is \$100,000 or more, use the Tax Computation Worksheet	44	4,948.
45	Add lines 31, 34, 40, 43, and 44	45	4,948.
46	Figure the tax on the amount on line 1c . If the amount on line 1c is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 1c is \$100,000 or more, use the Tax Computation Worksheet	46	4,948.
47	Tax on all taxable income (including capital gains and qualified dividends). Enter the smaller of line 45 or line 46. Also include this amount on Form 1040, line 16	47	4,948.

► Keep for your records

Name(s) Shown on Return

Michael Bickelmeyer

Social Security Number

1	Enter the amount from Form 1040 or 1040-SR, line 15.	1	_____
2	Enter the amount from Form 1040 or 1040-SR, line 3a	2	_____
3	Are you filing Schedule D?		
	<input type="checkbox"/> Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or loss, enter -0-	3	_____
	<input type="checkbox"/> No. Enter the amount from Form 1040 or 1040-SR, line 7.		_____
4	Add lines 2 and 3	4	_____
5	Subtract line 4 from line 1. If zero or less, enter -0-	5	_____
6	Enter:		
	\$40,000 if single or married filing separately,	}	6 _____
	\$80,000 if married filing jointly or qualifying widow(er),		
	\$53,600 if head of household.		
7	Enter the smaller of line 1 or line 6	7	_____
8	Enter the smaller of line 5 or line 7	8	_____
9	Subtract line 8 from line 7 (this amount taxed at 0%)	9	_____
10	Enter the smaller of line 1 or line 4	10	_____
11	Enter the amount from line 9	11	_____
12	Subtract line 11 from line 10.	12	_____
13	Enter:		
	\$441,450 if single,	}	13 _____
	\$248,300 if married filing separately,		
	\$496,600 if married filing jointly or qualifying widow(er),		
	\$469,050 if head of household.		
14	Enter the smaller of line 1 or line 13	14	_____
15	Add lines 5 and 9	15	_____
16	Subtract line 15 from line 14. If zero or less, enter -0-	16	_____
17	Enter the smaller of line 12 or line 16	17	_____
18	Multiply line 17 by 15% (0.15)	18	_____
19	Add lines 9 and 17.	19	_____
20	Subtract line 19 from line 10	20	_____
21	Multiply line 20 by 20% (0.20)	21	_____
22	Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet.		
23	Add lines 18, 21, and 22	23	_____
24	Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure this tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet.		
25	Tax on all taxable income. Enter the smaller of line 23 or line 24 here and on Form 1040 or 1040-SR, line 16.		
		25	_____

IRA Contributions Worksheet

2020

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Name(s) Shown on Return Michael Bickelmeyer	Social Security Number [REDACTED]
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Traditional IRA Contributions

Regular Traditional IRA Contributions		Taxpayer	Spouse
1	Enter traditional IRA contributions made for 2020, including any made between 1/1/2021 and 5/17/2021, any amounts later recharacterized to a Roth IRA, and any excess contributions, but not including any rollovers. Also include any contributions to deemed IRAs under an employer plan		
2	Contributions recharacterized from a Roth IRA (from line 24) . . .		
3	Traditional IRA contributions, from Schedule(s) K-1		
4	Contributions recharacterized (not converted) to a Roth IRA. . . .		
►	If there is a recharacterization indicated on line 4, an explanation must be attached to the tax return.		
5	Traditional IRA contributions. Combine lines 1 through 4		
6	Enter any contribution included on line 5 withdrawn before the due date of the tax return. <i>See Help</i>		
7	Excess traditional IRA contribution credit.		
8	Repayments of qualified reservist distributions		
9	Total traditional IRA contributions.		
Additional Traditional IRA Contribution Information		Taxpayer	Spouse
10	Check if covered by a retirement plan at work. If married filing a separate return, check box in spouse column, if applicable . . .	<input type="checkbox"/>	<input type="checkbox"/>
11	Enter any contributions included on line 9 that were made during 1/1/2021 to 5/17/2021 (<i>See Help</i>).		
Deductible and Non-deductible Traditional IRA Contributions		Taxpayer	Spouse
12	Deductible traditional IRA contributions from worksheet.		
13	Nondeductible traditional IRA contributions from worksheet. . . .		
	QuickZoom to worksheet indicated by the check: <input type="checkbox"/> IRA deduction worksheet ► <input type="checkbox"/> Worksheet for social security recipients ►		
14	Amount on line 13 you elect to make nondeductible		
15	Excess traditional IRA contributions, to Form 5329, line 15 Note: You may avoid a penalty by withdrawing the amount on line 15 before due date of return, including extensions.		
16	Deductible traditional IRA contributions, to Schedule 1 (Form 1040), Line 19.		
17	Qualified reservist repayments		
18	Nondeductible traditional IRA contributions, to Form 8606, In 1. . .		

IRA Contributions Worksheet

2020

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Michael Bickelmeyer

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Roth IRA Contributions

Regular Roth IRA Contributions		Taxpayer	Spouse
19	Enter regular Roth IRA contributions made for 2020, including any made between 1/1/2021 and 5/17/2021, any amounts later recharacterized to a traditional IRA, and any excess contributions, but not including any rollovers or conversions. Also include any contributions to deemed Roth IRAs under an employer plan.		
20	Contributions recharacterized from a traditional IRA, (from ln 4). .		
21	Roth IRA contributions, from Schedule(s) K-1.		
22	Enter contributions recharacterized to a traditional IRA.		
►	If there is a recharacterization indicated on line 23, an explanation must be attached to the tax return.		
23	Disallowed Roth IRA conversions		
24	Roth IRA contributions. Combine lines 20 through 23		
25	Enter any contribution included on line 24 withdrawn before the due date of the tax return. <i>See Help</i>		
26	Excess Roth IRA contribution credit		
27	Total Roth IRA contributions		
28	Repayments of qualified Roth reservist distributions		

Roth IRA Contributions After Limitations		Taxpayer	Spouse
29	Roth IRA contributions after limitation		
30	Excess Roth IRA contributions, to Form(s) 5329, line 23		
Note: You may avoid a penalty by withdrawing the amount on line 31 before due date of return, including extensions.			

Coverdell Education Savings Account (Education IRA) Contributions

Excess Coverdell Education Savings Account Contributions		Taxpayer	Spouse
31	Enter any excess contributions made to Coverdell Education Savings Accounts (ESAs) of which you are the beneficiary.		
Note: You do not need to report any Coverdell ESA contributions which are not excess contributions..			

- Keep for your records

Name(s) Shown on Return
Michael Bickelmeyer

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	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1	07/15/20		07/15/20			07/15/20		
2	07/15/20		07/15/20			07/15/20		
3	09/15/20		09/15/20			09/15/20		
4	01/15/21		01/15/21			01/15/21		
5								
Tot Estimated Payments . . .								

Tax Payments Other Than Withholding (If multiple states, see Tax Help)		Federal	State	ID	Local	ID
6	Overpayments applied to 2020					
7	Credited by estates and trusts					
8	Totals Lines 1 through 7					
9	2020 extensions					

Taxes Withheld From:					Federal	State	Local
10	Forms W-2				5,239.	1,238.	583.
11	Forms W-2G						
12	Forms 1099-R						
13	Forms 1099-MISC, 1099-NEC, 1099-K, 1099-G .						
14	Schedules K-1						
15	Forms 1099-INT, DIV and OID						
16	Social Security and Railroad Benefits						
17	Form 1099-B	St		Loc			
18 a	Other withholding	St		Loc			
b	Other withholding	St		Loc			
c	Other withholding	St		Loc			
d	Positive Adjustment	St		Loc			
e	Negative Adjustment	St		Loc			
f	Additional Medicare Tax.						
19	Total Withholding Lines 10 through 18f						
					5,239.	1,238.	583.
20	Total Tax Payments for 2020				5,239.	1,238.	583.

Prior Year Taxes Paid In 2020 (If multiple states or localities, see Tax Help)		State	ID	Local	ID
21	Tax paid with 2019 extensions				
22	2019 estimated tax paid after 12/31/2019				
23	Balance due paid with 2019 return				
24	Other (amended returns, installment payments, etc) . .				

Name(s) Shown on Return
Michael BickelmeyerSocial Security Number
[REDACTED]

Tax Deductions

1 State and local taxes:

Optional Sales Tax Tables

a Available Income:

(1) Income from Form 1040, line 7	54,041.
(2) Nontaxable income entered elsewhere on return	
(3) Available income: 2019 refundable credits in excess of tax	0.
(4) Enter any additional nontaxable income	
(5) Total available income	54,041.

b Sales Tax Per State of Residence:

Enter state in column (1), then enter total (combined) state and local sales tax rate in column (4).

Arizona, Colorado, Louisiana, Mississippi, New York or South Carolina only:

Double-click in column (4) to select your locality for each state entered.

(1) State	(2) Date Lived in State From	(3) Date Lived in State To	(4) Enter Total State & Local Rate (%)	(5) State Sales Tax Rate (%)	(6) Local Sales Tax Rate (%) (4) - (5)	(7) State Sales Tax Table Amount	(8) Local Sales Tax Amount	(9) Prorated or Total Amount

c Total general sales tax using tables

d Sales Tax Paid on Specific Items (see help):

(1) ST	(2) Total State & Local Rate	(3) Description	(4) Type	(5) Cost	(6) Rate if Different	(7) Actual Sales Tax Amount Paid	(8) Specific Item Deduction

e Total sales tax deduction on specific items

f Total general sales tax per tables plus sales tax on specific items

g Actual State and Local General Sales Tax:

Actual sales taxes (enter the total sales taxes paid during the year on all items).

h State and Local Income Taxes:

State and Local Income taxes 1,821.00

i State and Local Tax Deduction to Schedule A, line 5a:

Greater of line 1f, line 1g, or line 1h (to Schedule A, line 5a). 1,821.00

j Check a box to choose to use income taxes paid, sales taxes paid, or whichever provides the greater deduction:

Income Taxes ☐ Sales Taxes ☐ Greater amount ☒

2 State and local real estate taxes:

a Real estate taxes paid on principal residence not entered on Form 1098

b	Real estate taxes paid on principal residence entered on Home Mortgage Int. Wks	920.26
c	Real estate taxes paid on additional homes or land	
	Personal portion of real estate taxes from Schedule E Worksheet for:	
d	Principal residence	
e	Vacation home	
f	Less real estate taxes deducted on Form 8829	
g	Foreign real property taxes included in lines 2a-2f above	
h	Add lines 2a through 2f, less line 2g (to Schedule A, line 5b)	920.00
3	State and local personal property taxes:	
a	Auto registration fees based on the value of the vehicle.	
	2019 Amount Enter 2020 description:	
	_____	_____
	_____	_____
	_____	_____
b	Non-business portion of personal property taxes from Car & Truck Exp Wks	
c	Other personal property taxes	
d	Add lines 3a through 3c (to Schedule A, line 5c)	
4	Other taxes:	
a	Other taxes from Schedule(s) K-1	
b	Foreign taxes from interest and dividends	
c	Foreign taxes from Schedule(s) K-1	
d	Other foreign taxes (not used to claim a foreign tax credit)	
e	Other taxes.	
	2019 Amount Enter 2020 description:	
	_____	_____
	_____	_____
	_____	_____
f	Foreign real property taxes included in lines 4a-4e above	
g	Add lines 4a through 4e, less line 4f (to Schedule A, line 6)	

Interest Deductions

5	Home mortgage interest and points reported on Form 1098:
a	Mortgage interest and points from the Home Mortgage Interest Worksheet
b	Qualified mortgage interest from Schedule E Worksheet
c	Less home mortgage interest/points deducted on Form 8829
d	Less home mortgage interest from Form 8396, line 3
e	Add lines 5a through 5d (to Sch A, line 8a) or line A2 from above
6	Home mortgage interest not reported on Form 1098:
a	Mortgage interest from the Home Mortgage Interest Worksheet
b	Less home mortgage interest deducted on Form 8829
c	Add lines 6a and 6b (to Sch A, line 8b) or line B2 from above
7	Points not reported on Form 1098:
a	Amortizable points from the Home Mortgage Interest Worksheet
b	Other points not on Form 1098 from the Home Mortgage Interest Worksheet
c	Less points deducted on Form 8829
d	Add lines 7a through 7c (to Schedule A, line 8c) or line C2 from above

Schedule A
Line 5

State and Local Tax Deduction Worksheet

2020

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Name(s) Shown on Return Michael Bickelmeyer	Social Security Number [REDACTED]
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State and Local Income Taxes

State income taxes:		
1	State income tax withheld	1,238.
2	2020 state estimated taxes paid in 2020	
3	2019 state estimated taxes paid in 2020	
4	Amount paid with 2019 state application for extension	
5	Amount paid with 2019 state income tax return	
6	Overpayment on 2019 state income tax return applied to 2020 tax	
7	Other amounts paid in 2020 (amended returns, installment payments, etc.)	
8	State estimated tax from Schedule(s) K-1 (Form 1041)	
Local income taxes:		
9	Local income tax withheld	583.
10	2020 local estimated taxes paid in 2020	
11	2019 local estimated taxes paid in 2020	
12	Amount paid with 2019 local application for extension	
13	Amount paid with 2019 local income tax return	
14	Overpayment on 2019 local income tax return applied to 2020 tax	
15	Other amounts paid in 2020 (amended returns, installment payments, etc.)	
16	Local estimated tax from Schedule(s) K-1 (Form 1041)	
Other:		
17		
18	Total Add lines 1 through 17	1,821.
19	State and local refund allocated to 2020	
20	Nondeductible state income tax from line 28	
21	Total reductions Add lines 19 and 20	
22	Total state and local income tax deduction Line 18 less line 21	1,821.

Nondeductible State Income Tax (Hawaii Only)

23	Nontaxable federal employee cost of living allowance	
24	Adjusted gross income	
25	Add lines 23 and 24	
26	Nondeductible percent. Line 23 divided by line 25	%
27	Hawaii state income tax included in line 18	
28	Nondeductible Hawaii state income tax. Multiply line 26 by line 27.	

Name(s) Shown on Return
Michael Bickelmeyer

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Note: Use this worksheet to report home mortgage interest you paid on your main home or second home. Enter mortgage interest you paid for business property other than a home office on the appropriate schedule or form for the business activity (Schedule C, Schedule E, etc.).

Mortgage Lender Info:

- THIRD FEDERAL SAVINGS AND LOAN ASSOCIATION OF CLEVELAND

1 Recipient's/lender's name

2 a Was the mortgage interest reported to you on Form 1098? Yes ☒ No ☐
b Mortgage interest paid on your main home or second home in 2020 1,115.25
c Check this box if Box 7 is checked on Form 1098 ☐
d Is this loan secured by a residence of yours? Yes ☐ No ☒

3 Outstanding mortgage principal 32,467.90

4 Mortgage origination date 05/27/2016

5 a Did your home loan close after December 31, 2006? Yes ☐ No ☐
b Mortgage insurance premiums

6 Mortgage acquisition date

7 a Points paid to buy or improve your **main** home in 2020
b Check if points were reported to you on Form 1098 ☐
c Check if points were reported on the HUD-1 loan closing statement, or
my name is not listed first on Form 1098 ☐
Computed points reported on Form 1098 ☐
Computed points not reported on Form 1098 ☐

8 Property taxes 920.26

9 Check this box if you refinanced your loan with a different lender, paid off this loan,
or sold the property ☐

10 Did you pay points to this lender which must be spread over the life of the loan, for example:
points you paid on your second home, on a home equity loan, or when you refinanced,
enter the following Yes ☐ No ☒
a Total points originally paid on a loan for which the points must be amortized
b Length of loan (years)
c Points deducted in prior years for this loan
d Amortized points allowable this year
e Amortizable points deducted this year (to Tax and Interest Deduction Wkst., line 7a)*
* As adjusted by the Home Mortgage Interest Limitation Smart Worksheet below, if applicable

Uncommon Situations:

11 Were you and someone else liable for this mortgage and the **other person** received the
Form 1098, enter the other person's name and address Yes ☐ No ☒
Name
Address
City State ZIP

12 Did you buy your home from the recipient and did **NOT** receive a Form 1098, enter the
recipient's identifying number and address Yes ☐ No ☒
Recipient's SSN -OR- Recipient's EIN
Recipient's address
City State ZIP

13 Did you pay more mortgage interest than what is shown on Form 1098 Yes ☐ No ☐
QuickZoom to attach a statement to your return explaining the difference

Schedule A Deductible Home Mortgage Interest Worksheet

2020

Name(s) Shown on Return
Michael BickelmeyerSocial Security Number
[REDACTED]

Part 1 - Home Mortgage Loan Information

	Loan 1	Loan 2	Loan 3	Loan 4	Loan 5
Interest paid in 2020					
Points paid in 2020 on 1098	0.				
Points paid in 2020 not on 1098					
Mortgage origination date	05/27/2016				
Months loan outstanding	12				
Principal paid on loan in 2020					
Were all proceeds of this loan used to buy, build or substantially improve the taxpayer's home that secures the loan?	Yes No <input type="checkbox"/> <input type="checkbox"/>	Yes No <input type="checkbox"/> <input type="checkbox"/>	Yes No <input type="checkbox"/> <input type="checkbox"/>	Yes No <input type="checkbox"/> <input type="checkbox"/>	Yes No <input type="checkbox"/> <input type="checkbox"/>
Was the mortgage interest reported to you on form 1098?	<input checked="" 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"/> <input type="checkbox"/>

Home Debt Originating after December 15, 2017

Beginning of year balance					
Borrowed in 2020					
Home equity debt					
Principal applied					
Ending balance					
Enter amount of debt used to buy, build or substantially improve the home					
Average balance					

Home Debt Originating after October 13, 1987 and on or before December 15, 2017

Beginning of year balance					
Home equity debt					
Principal applied					
Ending balance					
Home equity debt					
Enter amount of debt used to buy, build or substantially improve the home					
Average balance					

Home Debt Originating before October 14, 1987 (Grandfathered Debt)

Beginning of year balance					
Principal applied					
Ending balance					
Enter amount of debt used to buy, build or substantially improve the home *					
* Per Pub. 936, all interest from grandfathered debt is deductible. The program will automatically treat the entire amount of debt as being used to buy, build or substantially improve the home					
Average balance					

Deductible Home Mortgage Interest Worksheet

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2020

Page 2

Part 1 — Qualified Loan Limit

Qualified loans acquired prior to October 14, 1987		
1	Average balance of debt acquired prior to October 14, 1987 (grandfathered debt)	1
Qualified loans acquired after October 13, 1987 and before December 16, 2017		
2	Average balance of debt acquired after October 13, 1987 and before December 16, 2017	2
3	Enter \$1,000,000 (\$500,000 if married filing separately)	3
4	Enter larger of the amount on line 1 or the amount on line 3.	4
5	Add the amounts on lines 1 and 2. Enter the total here	5
6	Enter the smaller of the amount on line 4 or the amount on line 5.	6
Qualified loans acquired after December 15, 2017		
7	Average balance of debt acquired after December 15, 2017	7
8	Enter \$750,000 (\$375,000 if married filing separately)	8
9	Enter larger of the amount on line 6 and the amount on line 8.	9
10	Add the amounts on lines 6 and 7. Enter the total here.	10
Total qualified loans		
11	Enter the smaller of line 9 or line 10. This is your qualified loan limit	11

Part 2 — Deductible Home Mortgage Interest

12	Enter the total of the average balances of all mortgages from lines 1, 2 and 7 on all qualified homes. See the line 12 instructions	12
13	Total amount of interest that you paid on the loans from line 12 reported on form 1098.	13
14	Total amount of interest that you paid on the loans from line 12 not reported on form 1098	14
15	Divide line 11 by line 12	15
16	Multiply line 13 by the decimal amount on line 15. Enter the result. This is deductible home mortgage interest for loans reported on form 1098 Enter this amount on Schedule A line 8a	16
17	Multiply line 14 by the decimal amount on line 15. Enter the result. This is deductible home mortgage interest for loans not reported on form 1098. Enter this amount on Schedule A line 8b	17
18	Subtract line 15 from line 13. This is not home mortgage interest	18

Charitable Deduction Limits Worksheet For Current Year Contributions

2020

► Keep for your records

Name(s) Shown on Return

Michael Bickelmeyer

Social Security Number

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Step 1 — Enter your other charitable contributions made during the year.

1 Enter your cash contributions to 100% limit organizations	1	
2 Enter your contributions of capital gain property "for the use of" any qualified organization	2	
3 Enter your other contributions "for the use of" any qualified organization. Don't include any contributions you entered on a previous line	3	
4 Enter your other contributions to qualified organizations that aren't 50% limit organizations. Don't include any contributions you entered on a previous line	4	
5 Enter your contributions of capital gain property to 50% limit organizations deducted at fair market value. Don't include any contributions you entered on a previous line.	5	
6 Enter your noncash contributions to 50% limit organizations other than capital gain property you deducted at fair market value. Be sure to include contributions of capital gain property to 50% limit organizations if you reduced the property's fair market value. Don't include any contributions you entered on a previous line	6	
7 Enter your cash contributions to 50% limit organizations. Don't include any contributions you entered on a previous line	7	

Step 2 — Figure your deduction for the year (if any result is zero or less, enter -0-)

8 Enter your adjusted gross income (AGI)	8	54,041.
--	---	---------

A Cash contributions subject to the limit based on 60% of AGI

(If line 7 is zero, leave lines 9 through 11 blank)

9 Multiply line 8 by 0.6	9	
10 Deductible amount. Enter the smaller of line 7 or line 9.	10	
11 Carryover. Subtract line 10 from line 7.	11	

B Noncash contributions subject to the limit based on 50% of AGI

(If line 6 is zero, leave lines 12 through 15 blank)

12 Multiply line 8 by 0.5	12	
13 Subtract line 10 from line 12	13	
14 Deductible amount. Enter the smaller of line 6 or line 13	14	
15 Carryover. Subtract line 14 from line 6.	15	

C Contributions (other than capital gain property) subject to limit based on 30% of AGI

(If lines 3 and 4 are both zero, leave lines 16 through 22 blank)

16 Multiply line 8 by 0.5	16	
17 Add lines 5, 6, and 7.	17	
18 Subtract line 17 from line 16	18	
19 Multiply line 8 by 0.3	19	
20 Add lines 3 and 4	20	
21 Deductible amount. Enter the smallest of line 18, 19, or 20 . .	21	
22 Carryover. Subtract line 21 from line 20	22	

D Contributions of capital gain property subject to limit based on 30% of AGI

(If line 5 is zero, leave lines 23 through 28 blank)

23 Multiply line 8 by 0.5	23	
24 Add lines 6 and 7	24	
25 Subtract line 24 from line 23	25	
26 Multiply line 8 by 0.3	26	
27 Deductible amount. Enter the smallest of line 5, 25, or 26 . .	27	
28 Carryover. Subtract line 27 from line 5.	28	

E Contributions subject to the limit based on 20% of AGI

(If line 2 is zero, leave lines 29 through 37 blank)

29 Multiply line 8 by 0.5	29	
30 Add lines 10, 14, 21, and 27	30	

31	Subtract line 30 from line 29	31		
32	Multiply line 8 by 0.3	32		
33	Subtract line 21 from line 32	33		
34	Subtract line 27 from line 32	34		
35	Multiply line 8 by 0.2	35		
36	Deductible amount. Enter the smallest of line 2, 31, 33, 34, or 35	36		
37	Carryover. Subtract line 36 from line 2	37		

F Qualified contributions subject to limit based on 100% of AGI

(If line 1 is zero, leave lines 38 through 42 blank)

38	Enter the amount from line 8	38		
39	Add lines 10, 14, 21, 27, and 36	39		
40	Subtract line 39 from line 38	40		
41	Deductible amount. Enter the smaller of line 1 or line 40	41		
42	Carryover. Subtract line 41 from line 1	42		

G Deduction for the year

43	Add lines 10, 14, 21, 27 and 36. Enter the total here and include the deductible amounts on Schedule A (Form 1040), line 11 or line 12 whichever is appropriate. Also, enter the amount from line 41 on the dotted line next to the line 11 entry space.	43		
44	Carryover to next year. Add lines 11, 15, 22, 28 and 37	44		

Note: Any amounts in the carryover column are not deductible this year but can be carried over to next year. See Carryovers, later, for more information about how you will use them next year.

Charitable Deduction Limits Worksheet For Carryover Contributions

2020

► Keep for your records

Name(s) Shown on Return
Michael Bickelmeyer

Social Security Number
[REDACTED]

Step 1 — Enter your other charitable contributions made during the year.

<p>1 Enter your cash contributions to 100% limit organizations</p> <p>2 Enter your contributions of capital gain property "for the use of" any qualified organization</p> <p>3 Enter your other contributions "for the use of" any qualified organization. Don't include any contributions you entered on a previous line</p> <p>4 Enter your other contributions to qualified organizations that aren't 50% limit organizations. Don't include any contributions you entered on a previous line</p> <p>5 Enter your contributions of capital gain property to 50% limit organizations deducted at fair market value. Don't include any contributions you entered on a previous line.</p> <p>6 Enter your noncash contributions to 50% limit organizations other than capital gain property you deducted at fair market value. Be sure to include contributions of capital gain property to 50% limit organizations if you reduced the property's fair market value. Don't include any contributions you entered on a previous line</p> <p>7 Enter your cash contributions to 50% limit organizations. Don't include any contributions you entered on a previous line</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p>	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px;"></div>
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Step 2 — Figure your deduction for the year (if any result is zero or less, enter -0-)

<p>8 Enter your adjusted gross income (AGI)</p>	<p>8</p>	<div style="border-bottom: 1px solid black; height: 20px;"></div>
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	Percentage of line 8		Used in Current Year		
a 60% AGI limit to line 9	32,425.	Less	0.	a	32,425.
b 50% AGI limit to line 12	27,021.	Less	0.	b	27,021.
c 30% AGI limit, Section C to line 19	16,212.	Less	0.	c	16,212.
d 30% AGI limit, Section D to line 26	16,212.	Less	0.	d	16,212.
e 20% AGI limit to line 35	10,808.	Less	0.	e	10,808.

A Cash contributions subject to the limit based on 60% of AGI

(If line 7 is zero, leave lines 9 through 11 blank)

<p>9 Multiply line 8 by 0.6</p> <p>10 Deductible amount. Enter the smaller of line 7 or line 9</p> <p>11 Carryover. Subtract line 10 from line 7</p>	<p>9</p> <p>10</p> <p>11</p>	<div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0;"></div>
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B Noncash contributions subject to the limit based on 50% of AGI

(If line 6 is zero, leave lines 12 through 15 blank)

<p>12 Multiply line 8 by 0.5</p> <p>13 Subtract line 10 from line 12</p> <p>14 Deductible amount. Enter the smaller of line 6 or line 13</p> <p>15 Carryover. Subtract line 14 from line 6</p>	<p>12</p> <p>13</p> <p>14</p> <p>15</p>	<div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0;"></div>
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C Contributions (other than capital gain property) subject to limit based on 30% of AGI

(If lines 3 and 4 are both zero, leave lines 16 through 22 blank)

<p>16 Multiply line 8 by 0.5</p> <p>17 Add lines 5, 6, and 7</p> <p>18 Subtract line 17 from line 16</p> <p>19 Multiply line 8 by 0.3</p> <p>20 Add lines 3 and 4</p> <p>21 Deductible amount. Enter the smallest of line 18, 19, or 20</p> <p>22 Carryover. Subtract line 21 from line 20</p>	<p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p>	<div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0;"></div>
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D Contributions of capital gain property subject to limit based on 30% of AGI

(If line 5 is zero, leave lines 23 through 28 blank)

<p>23 Multiply line 8 by 0.5</p> <p>24 Add lines 6 and 7</p> <p>25 Subtract line 24 from line 23</p> <p>26 Multiply line 8 by 0.3</p> <p>27 Deductible amount. Enter the smallest of line 5, 25, or 26</p> <p>28 Carryover. Subtract line 27 from line 5</p>	<p>23</p> <p>24</p> <p>25</p> <p>26</p> <p>27</p> <p>28</p>	<div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0;"></div>
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E Contributions subject to the limit based on 20% of AGI

(If line 2 is zero, leave lines 29 through 37 blank)

<p>29 Multiply line 8 by 0.5</p> <p>30 Add lines 10, 14, 21, and 27</p>	<p>29</p> <p>30</p>	<div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px; background-color: #f0f0f0;"></div>
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31	Subtract line 30 from line 29	31		
32	Multiply line 8 by 0.3	32		
33	Subtract line 21 from line 32	33		
34	Subtract line 27 from line 32	34		
35	Multiply line 8 by 0.2	35		
36	Deductible amount. Enter the smallest of line 2, 31, 33, 34, or 35	36		
37	Carryover. Subtract line 36 from line 2	37		

F Qualified contributions for certain disaster relief efforts (Not applicable for carryovers)

(If line 1 is zero, leave lines 38 through 42 blank)

38	Enter the amount from line 8	38		
39	Add lines 10, 14, 21, 27, and 36	39		
40	Subtract line 39 from line 38	40		
41	Deductible amount. Enter the smaller of line 1 or line 40	41		
42	Carryover. Subtract line 41 from line 1	42		

G Deduction for the year

43	Add lines 10, 14, 21, 27 and 36. Enter the total here and include the deductible amounts on Schedule A (Form 1040), line 11 or line 12 whichever is appropriate. Also, enter the amount from line 41 on the dotted line next to the line 11 entry space.	43		
44	Carryover to next year. Add lines 11, 15, 22, 28 and 37	44		

Note: Any amounts in the carryover column are not deductible this year but can be carried over to next year. See Carryovers, later, for more information about how you will use them next year.

- Keep for your records

Name(s) Shown on Return
Michael Bickelmeyer

Social Security Number

Name of Charitable Organization	(a) Total	(b) 60% Limit	(c) 30% Limit	(d) 100% Limit
Totals:				

Name of Charitable Organization	Total	Other Property		Capital Gain Property	
	(a) Total	(b) 50% Limit	(c) 30% Limit	(d) 30% Limit	(e) 20% Limit
Totals:					

	Total	Cash and Other Non-Capital Gain Property				Capital Gain Property	
	(a) Total	(b) 100% Limit	(c) 60% Limit	(d) 50% Limit	(e) 30% Limit	(f) 30% Limit	(g) 20% Limit
1 2020 contributions .							
2 2020 contributions allowed							
3 Carryovers from:							
a 2019 tax year . . .		N/A					
b 2018 tax year . . .		N/A					
c 2017 tax year . . .		N/A					
d 2016 tax year . . .		N/A					
e 2015 tax year . . .		N/A					
4 Carryovers							
allowed in 2020		N/A					
5 Carryovers							
disallowed in 2020		N/A					
6 Carryovers to 2021:							
a From 2020.							
b From 2019.		N/A					
c From 2018.		N/A					
d From 2017.		N/A					
e From 2016.		N/A					
f From 2015.		N/A					

2	Was the entire interest given for all property donated to all charities?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
3	Were restrictions attached to any charities's right to use or dispose of any property donated to any charity?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
4	Did you give to anyone other than the charity the right to income from any of the donated property or to possession of any of the donated property?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	Was any charity other than a 60%/50% charity?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

► Keep for your records

Name(s) Shown on Return

Michael Bickelmeyer

Social Security Number

Use this worksheet **only** if someone can claim you, or your spouse if filing jointly, as a dependent.**1** Is your **earned income*** more than \$750?☐
☐**Yes.** Add \$350 to your earned income. Enter the total**No.** Enter \$1,100
..... **1****2** Enter the amount shown below for your filing status.

• Single or married filing separately — \$12,400

• Married filing jointly — \$24,800

• Head of household — \$18,650

..... **2**

12,400.

3 Standard deduction.**3 a** Enter the **smaller** of line 1 or line 2. If born after January 1, 1956, and not blind, **stop here** and enter this amount on Form 1040 or 1040-SR, line 12. Otherwise, go to line 3b**3 a****3 b** If born before January 2, 1956, or blind, multiply the number claimed on top of page 2 of Form 1040 Wkst by \$1,300 (\$1,650 if single or head of household)**3 b****3 c** Add lines 3a and 3b. Enter the total here and on Form 1040 or 1040-SR, line 12**3 c**

***Earned income** includes wages, salaries, tips, professional fees, and other compensation received for personal services you performed. It also includes any taxable scholarship or fellowship grant. Generally, your earned income is the total of the amount(s) you reported on Form 1040 or 1040-SR, line 1, and Schedule 1, lines 3 and 6, minus the amount, if any, on Schedule 1, line 14. Earned income, for the purpose of figuring your standard deduction, doesn't include qualified disability trust distributions.

Earned Income Worksheet

► Keep for your records

2020

Name(s) Shown on Return
Michael Bickelmeyer

Social Security Number
[REDACTED]

Part I – Earned Income Credit Worksheet Computation

	Taxpayer	Spouse	Total
1 If filing Schedule SE:			
a Net self-employment income			
b Optional Method and Church Employee income			
c Add lines 1a and 1b			
d One-half of self-employment tax			
e Subtract line 1d from line 1c			
2 If not required to file Schedule SE:			
a Net farm profit or (loss)			
b Net nonfarm profit or (loss)			
c Add lines 2a and 2b			
3 If filing Schedule C as a statutory employee, enter the amount from line 1 of that Schedule C			
4 Add lines 1e, 2c and 3. To EIC Wks, line 5			

Part II – Form 2441 and Standard Deduction Worksheet Computations

5 Net self-employment earnings (line 4 above)			
6 Wages, salaries, and tips less distributions from nonqualified or section 457 plans, etc	54,753.		54,753.
7 a Taxable employer-provided adoption benefits			
b Foreign earned income exclusion			
8 Add lines 5 through 7b. To Form 2441, lines 18 and 19	54,753.		54,753.
9 a Taxable dependent care benefits			
b Nontaxable combat pay			
10 Add lines 8, 9a & 9b. To Form 2441, lines 4 and 5	54,753.		54,753.
11 Scholarship or fellowship income not on W-2			
12 SE exempt earnings less nontaxable income			
13 Distributions from nonqualified/Sec. 457 plans			
14 Add lines 5, 6, 7a, 9a and 11 through 13. To Standard Deduction Worksheet	54,753.		54,753.

Part III – IRA Deduction Worksheet Computation

15 Net self-employment income or (loss)			
16 Wages, salaries, tips, etc	54,753.		54,753.
17 Net self-employment loss			
18 Alimony received			
19 Nontaxable combat pay			
20 Foreign earned income exclusion			
21 Keogh, SEP or SIMPLE deduction			
22 Combine lines 15 through 21. To IRA Wks, ln 2.	54,753.		54,753.

Part IV – Schedule 8812 and Child Tax Credit Line 14 Worksheet Computations

23 Self-employed, church and statutory employees			
24 Wages, salaries, tips, etc	54,753.		54,753.
25 Nontaxable combat pay			
26 Combine lines 23 through 25. To Schedule 8812, line 6a & Line 14 Wks, line 2.	54,753.		54,753.

Name(s) Shown on Return
Michael Bickelmeyer

Social Security Number
[REDACTED]

QuickZoom to Schedule EIC ►
QuickZoom to Dependent Information Worksheet to enter qualifying children information. ►
QuickZoom to Wages, Salaries, & Tips Worksheet to enter earned and non-earned income ►
QuickZoom to page 2 of this worksheet, if credit is not calculated on line 7. ►

<p>1 Enter the amount from Form 1040 line 1 less amounts considered not earned for EIC purposes</p> <p>2 Adjustments to line 1 amount:</p> <p style="padding-left: 20px;">a Income reported as wages and as self-employment income.</p> <p style="padding-left: 20px;">b Other income entered as wages that is not considered earned income</p> <p style="padding-left: 20px;">c Distributions from section 457 and other nonqualified plans reported on W-2</p> <p>3 Subtract lines 2a, 2b and 2c from line 1</p> <p>4 a Taxpayer's nontaxable combat pay election for EIC</p> <p style="padding-left: 20px;">b Spouse's nontaxable combat pay election for EIC</p> <p style="padding-left: 20px;">c Total nontaxable combat pay election</p> <p>5 If you were self-employed or used Schedule C as a statutory employee, enter the amount from the Earned Income Worksheet, line 4</p> <p>6 Medicaid Waiver Payments reported as nontaxable</p> <p>7 Earned income. Add lines 3, 4, 5, and 6</p> <p>8 Enter the credit, from the EIC Table, for the amount on line 7. Be sure to use the correct column for filing status and number of children.</p> <p style="padding-left: 20px;">If line 8 is zero, stop. You cannot take the credit. Enter "No" on the dotted line next to Form 1040, line 27.</p> <p>9 Enter your AGI from Form 1040, line 11</p> <p>10 If you have:</p> <ul style="list-style-type: none"> • No qualifying children, is the amount on line 9 less than \$8,800 (\$14,700 if married filing jointly)? • 1 or more qualifying children, is the amount on line 9 less than \$19,350 (\$25,250 if married filing jointly)? <p><input checked="" type="checkbox"/> Yes. Go to line 11 now.</p> <p><input type="checkbox"/> No. Enter the credit, from the EIC Table, for the amount on line 9. Be sure to use the correct column for filing status and number of children</p> <p>11 Earned income credit.</p> <ul style="list-style-type: none"> • If 'Yes' on line 10, enter the amount from line 8 • If 'No' on line 10, enter the smaller of line 8 or line 10 	<p>1</p> <p>2 a</p> <p>b</p> <p>c</p> <p>3</p> <p>4 a</p> <p>b</p> <p>c</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p>	<p>54,753.</p> <p></p> <p></p> <p>54,753.</p> <p></p> <p></p> <p></p> <p>54,753.</p> <p>0.</p> <p></p> <p></p> <p></p> <p></p>
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Enter line 11 amount on Form 1040, line 27.

If one or more of the boxes below are checked, the earned income credit is not allowed.

- 1 ☒ The total taxable earned income (line 7 above) is equal to or more than:
☐ \$15,820 (\$21,710 if married filing jointly) without a qualifying child.
☐ \$41,756 (\$47,646 if married filing jointly) with one qualifying child.
☐ \$47,440 (\$53,330 if married filing jointly) with two qualifying children.
☐ \$50,954 (\$56,844 if married filing jointly) with more than two qualifying children.
- 2 ☒ The Adjusted Gross Income (line 9 above) is equal to or more than:
☐ \$15,820 (\$21,710 if married filing jointly) without a qualifying child.
☐ \$41,756 (\$47,646 if married filing jointly) with one qualifying child.
☐ \$47,440 (\$53,330 if married filing jointly) with two qualifying children.
☐ \$50,954 (\$56,844 if married filing jointly) with more than two qualifying children.
- 3 ☐ Investment income is more than \$3,650.
(Investment Income Smart Worksheet, item H above)
- 4 ☐ The married filing separate return status is checked.
(Information Worksheet, Part II)
- 5 ☐ Taxpayer (or spouse if filing joint) is a qualifying child of another person.
(Information Worksheet, Part IV)
- 6 ☐ Without a qualifying child, and your (or your spouse's, if married filing jointly) main home is in the U.S. less than half the year.
(Information Worksheet, Part IV)
- 7 ☐ Without a qualifying child, and taxpayer (and spouse if filing joint) are under age 25 or over age 64.
(Information Worksheet, Part I)
- 8 ☐ Without a qualifying child, and taxpayer (or spouse if filing joint) is eligible to be claimed as a dependent on someone else's return.
(Information Worksheet, Part I)
- 9 ☐ Social Security Number is invalid for EIC purposes, for taxpayer, (or spouse, if married filing joint).
(Information Worksheet, Part I)
- 10 ☐ Have qualifying children, but all are either
a ☐ qualifying children of another person, or
b ☐ invalid social security numbers for EIC purposes.
(Information Worksheet, Part III)
- 11 ☐ Disallowed by IRS to claim Earned Income Credit in 2020.
(Information Worksheet, Part IV)
- 12 ☐ Filing Form 2555, Foreign Earned Income.
- 13 ☐ Not a citizen or resident alien for the entire year, claiming dual status.
(Information Worksheet, Part VI)
- 14 ☐ Head of household filing status and lived with nonresident alien spouse during the last six months of the year.
(Information Worksheet, Part IV)

Compliance and Due Diligence Information

1 Is this how long your dependents lived with you in the U.S in 2020?

☐ Yes, all of the above is correct.

☐ No, I'll go back and review my dependent information.

The IRS may ask you for documents to prove you lived with anyone you're claiming for the Earned Income Credit.

Is this where you lived with your dependents the longest in 2020?

2 ☐ Yes, my dependents lived with me at this address.

☐ No, I'd like to add an additional address where I lived with my dependents. Use the Interview to add an additional address where you lived with your dependents the longest in 2020.

Compliance and Due Diligence Indicator ☒ X

Disqualified from Earned Income Credit. ☒ X Yes ☐ No

Potential qualifying child count ▶ 0

Non dependent potential qualifying child count ▶ 0

Qualifying child count (max 3) ▶ 0

Name(s) Shown on Return
Michael BickelmeyerSocial Security Number
[REDACTED]**Part I Information from Form(s) 1098-E, Student Loan Interest Statement**

(a) Lender's name	(b) Borrower (Taxpayer, Spouse)	(c) Borrower's social security number	(d) Prior Year Student Loan Interest	(e) Student loan interest (Box 1)
U.S. DEPARTMENT OF EDUCATION	Taxpayer	[REDACTED]		712.
Total student loan interest.				712.
Less total student loan interest used for QTP (Section 529 plan)				
Total adjusted student loan interest				712.

Part II Computation of Student Loan Interest Deduction

1	Enter the total interest you paid in 2020 on qualified student loans (see Form 1040 instructions).	1	712.
2	Enter the smaller of line 1 or \$2,500.	2	712.
3	Modified AGI Note: If line 3 is \$85,000 or more if single, head of household, or qualifying widow(er) or \$170,000 or more if married filing jointly, stop here . You cannot take the deduction.	3	54,753.
4	Enter: \$70,000 if single, head of household, or qualifying widow(er); \$140,000 if married filing jointly.	4	70,000.
5	Subtract line 4 from line 3. If zero or less, enter -0- here and on line 7, skip line 6, and go on to line 8	5	0.
6	Divide line 5 by \$15,000 or \$30,000 if married filing jointly. Enter the result as a decimal (rounded to at least three places)	6	0.0000
7	Multiply line 2 by line 6	7	0.
8	Student loan interest deduction. Subtract line 7 from line 2. Enter the result here and on Form 1040, Sch 1, line 20. Do not include this amount in figuring any other deduction on your return (such as on Schedule A, C, E, etc.)	8	712.

* **Modified AGI** is the amount from Form 1040, line 8b, increased by any excludable income from Puerto Rico, or of bona fide residents of American Samoa, Guam, or the Commonwealth of the Northern Mariana Islands, and foreign earned income/housing exclusion, and decreased by amounts on Schedule 1 (Form 1040), lines 10 through 19 and any write-in amount next to line 22, not including the Foreign housing deduction on line A of the Other Adjustments to Income Smart Worksheet.

Casualty and Theft Worksheet

2020

Use a separate worksheet for each casualty or theft event.

► Keep for your records

Name(s) shown on return

Michael Bickelmeyer

Social Security No.

Part I Casualty or Theft Event Information

- 1 Description of this casualty or theft event ►
- 2 Date of casualty or theft event ►
- 3 Use of property, check one if not a Ponzi loss (line 5c):
 - a Personal (includes home office deducted under simplified method, see tax help) ☐
 - b Business, employment, or income-producing ☐
- 4 If box 3a is checked, check one:
 - a This event qualifies as a Hurricane Harvey or Tropical Storm Harvey Disaster ☐
 - b This event qualifies as a Hurricane Irma Disaster ☐
 - c This event qualifies as a Hurricane Maria Disaster ☐
 - d This event qualifies as a **2017** California Wildfire Disaster (01/01/2017-01/18/2018) ☐
 - e This event is a qualified federally declared major disaster ☐
 - f This event is a federally declared disaster (not "qualified") ☐
 - g This event qualifies as a **2016** federally declared disaster area ☐
 - h This event **does not** qualify as a federally declared disaster ☐
 - i Enter the FEMA disaster decl. number if any line 4a-g is checked. Enter the four-digit number only. If the FEMA disaster decl. number begins with DR, enter it here
 - j If the FEMA disaster decl. number begins with EM instead of DR, enter it here
- 5 If box 3b is checked, check one:
 - a Check if the property was used in a passive activity ☐
 - b Check if the property was **not** used in a passive activity ☐
 - c Check if this is a Rev Proc 2009-20 Ponzi-Type loss ☐
- 6 Worksheet Copy Number 1

Part II Property Information for All Properties Damaged or Stolen in the Casualty or Theft Event

- a **Description** including type of property
- b For personal use property, enter the address, city, state and ZIP code
- c Date acquired
- d Cost or other basis
- e Insurance or other reimbursement
- f FMV before event
- g FMV after event
- h Was this a total loss? Yes . . . ☐ No . . . ☐
- i If **personal** use, is this a collectible? Yes . . . ☐ No . . . ☐
- j If **business** use, check one: Business ☐ Employ ☐ Income . . ☐
- k If **home office** (standard method) enter: Sch C ☐ No Sch C ☐ Ln 27

- a **Description** including type of property
- b For personal use property, enter the address, city, state and ZIP code
- c Date acquired
- d Cost or other basis
- e Insurance or other reimbursement
- f FMV before event
- g FMV after event
- h Was this a total loss? Yes . . . ☐ No . . . ☐
- i If **personal** use, is this a collectible? Yes . . . ☐ No . . . ☐
- j If **business** use, check one: Business ☐ Employ ☐ Income . . ☐
- k If **home office** (standard method) enter: Sch C ☐ No Sch C ☐ Ln 27

Schedule D Tax Worksheet
as refigured for the
Alternative Minimum Tax
► Keep for your records

2020

Name(s) Shown on Return
Michael Bickelmeyer

Social Security Number
[REDACTED]

	(a) Before Allocation of Capital Gain Excess *	(b) Allocation of Capital Gain Excess *	(c) After Allocation of Capital Gain Excess
1 Not applicable			
2 Enter your total qualified dividends as refigured for the Alternative Minimum Tax (AMT):			
a Total qualified dividends.			
b Adjustment from Schedules K-1			
c Other adjustments to qualified dividends			
d Total. Combine lines 2a, 2b, and 2c		0.	0.
3 Enter the amount from Form 4952 for AMT, line 4g.			
4 Enter the amount from Form 4952 for AMT, line 4e.			
5 Subtract line 4 from line 3. If zero or less, enter -0-	0.		0.
6 Subtract line 5 from line 2. If zero or less, enter -0-	0.		0.
7 Net long-term capital gain:			
a Enter the gain from line 15 of Schedule D as refigured for the AMT	0.		
b Enter the gain from line 16 of Schedule D as refigured for the AMT	0.		
c Enter the smaller of line 7a or line 7b	0.		0.
8 Enter the smaller of line 3 or line 4			
9 Subtract line 8 from line 7c. If zero or less, enter -0-	0.	0.	0.
10 Add lines 6 and 9	0.		0.
A Enter the amount from Form 6251, line 6.	0.		
B Capital gain excess. Subtract line A from line 10. *	0.		
11 Total 28% rate and unrecaptured section 1250 gain:			
a Enter the gain from line 18 of Schedule D as refigured for the AMT	0.		
b Enter the gain from line 19 of Schedule D as refigured for the AMT			
c Add lines 11a and 11b.			0.
12 Enter the smaller of line 9 or line 11c			0.
13 Subtract line 12 from line 10. Also enter this amount on Form 6251, line 13.			0.

* Capital gain excess applies only if filing Form 2555, Foreign Earned Income.

► Keep for your records

Name(s) Shown on Return

Michael Bickelmeyer

Social Security Number

Taxable Income – Line 1

1	Enter the amount from Form 1040 or 1040-SR, line 15, if more than zero. If Form 1040 or 1040-SR, line 15, is zero, subtract lines 12 and 13 of Form 1040 or 1040-SR from line 11 of Form 1040 or 1040-SR and enter the result here. (If less than zero, enter as a negative amount.)	1	41,641.
2	Additions to income	2	
3	Add lines 1 and 2	3	41,641.
4	Subtractions from income	4	
5	Subtract line 4 from line 3. Enter on Form 6251, line 1	5	41,641.

Taxes – Line 2a

1	Generation skipping transfer taxes included on Schedule A, line 6	1	
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Refund of Taxes – Line 2b

1	Taxable refund of state and local income tax	1	
2	Amount and description of any refund of state and local personal property taxes, foreign income or real property taxes	2	
3	Total tax refund adjustment. Enter on Form 6251, line 2b	3	

Alternative Tax Net Operating Loss Deduction (ATNOLD) – Line 2f

1	Alternative minimum taxable income (AMTI) without ATNOLD	1	54,041.
2	Enter adjustments	2	
3	Adjustment for domestic production activities deduction	3	
4	Adjusted AMTI without ATNOLD. Add lines 1-3	4	54,041.
5	ATNOLD limitation. Multiply line 4 by 90%	5	48,637.
6	Enter ATNOL carried to 2019 from other year(s)	6	
7	Enter ATNOL included above attributable to qualified disaster losses	7	
8	ATNOL above not attributable to qualified disaster losses. Line 6 minus 7	8	
9	ATNOL deduction other than qualified disaster losses. Lesser of line 5 or 8	9	
10	ATNOL Disaster Deduction. Lesser of line 7 or (line 4 minus line 9)	10	
11	ATNOLD. Add lines 9 and 10. Enter on Form 6251, line 2f, as neg	11	

Incentive Stock Options – Line 2i

1	Incentive stock options adjustment from Schedule K-1 worksheets	1	
2	Incentive stock options from Employer Stock Transaction Worksheets	2	
3	Incentive stock options from Exercise of Stock Options Worksheets	3	
4	Other incentive stock options	4	
5	Total incentive stock options. Enter on Form 6251, line 2i	5	

Alternative Minimum Taxable Income – Line 4

If married filing separately and Form 6251, line 4, is more than \$745,200:

1	Alternative minimum taxable income, Form 6251	1	
2	Threshold amount	2	
3	Subtract line 2 from line 1.	3	
4	Multiply line 3 by 25% (.25)	4	
5	Smaller of line 4 or \$56,700	5	
6	Add line 1 and line 5. Enter on Form 6251, line 4	6	

Exemption – Line 5

1	Enter \$72,900 if single or head of household, \$113,400 if married filing jointly or qualifying widow(er), \$56,700 if married filing separately	1	72,900.
2	Enter your alternative minimum taxable income from Form 6251, line 4	2	54,041.
3	Enter \$518,400 if single or head of household, \$1,036,800 if married filing jointly or qualifying widow(er), \$518,400 if married filing separately	3	518,400.
4	Subtract line 3 from line 2. If zero or less, enter -0-	4	0.
5	Multiply line 4 by 25% (.25)	5	0.
6	Subtract line 5 from line 1. If zero or less, enter -0-. Enter on 6251, line 5	6	72,900.

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Name(s) Shown on Return

Michael Bickelmeyer

Social Security Number

[REDACTED]

1	Enter the amount from Form 6251, line 6	1	
2 a	Enter the amount from your (and your spouse's if filing jointly) Form 2555, lines 45 and 50	2a	
b	Enter the total amount of any itemized deductions or exclusions you couldn't claim because they are related to excluded income	2b	
c	Subtract line 2b from line 2a. If zero or less, enter 0	2c	
3	Add line 1 and line 2c	3	
4	Tax on the amount on line 3. <ul style="list-style-type: none"> ● If you reported capital gain distributions directly on Form 1040 or 1040-SR, line 7; or you reported qualified dividends on Form 1040 or 1040-SR, line 3a; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040 or 1040-SR) (as refigured for the AMT, if necessary), enter the amount from line 3 of this worksheet on Form 6251, line 12. Complete the rest of Part III of Form 6251. However, before completing Part III, see <i>Form 2555</i>, later, to see if you must complete Part III with certain modifications. Then enter the amount from Form 6251, line 40, here. ● All Others: If line 3 is \$197,900 or less (\$98,950 or less if married filing separately), multiply line 3 by 26% (0.26). Otherwise, multiply line 3 by 28% (0.28) and subtract \$3,958 (\$1,979 if married filing separately) from the result. 	4	
5	Tax on amount on line 2c. If line 2c is \$197,900 or less (\$98,950 or less if married filing separately), multiply line 2c by 26% (0.26). Otherwise, multiply line 2c by 28% (0.28) and subtract \$3,958 (\$1,979 if married filing separately) from the result	5	
6	Subtract line 5 from line 4. Enter the result here and on Form 6251, line 7.	6	

Federal Carryover Worksheet

2020

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Name(s) Shown on Return

Michael Bickelmeyer

Social Security Number

[REDACTED]

2019 State and Local Income Tax Information

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With- held/Pmts	(e) Paid With Return	(f) Total Over- payment	(g) Applied Amount
Totals . .						

2019 State Extension Information

(a) State	(b) Paid With Extension

2019 Locality Extension Information

(a) Locality	(b) Paid With Extension

2019 State Estimates Information

(a) State	(c) Estimates Paid After 12/31

2019 Locality Estimates Information

(a) Locality	(c) Estimates Paid After 12/31

2019 State Taxes Due Information

(a) State	(e) Paid With Return

2019 Locality Taxes Due Information

(a) Locality	(e) Paid With Return

2019 State Refund Applied Information

(a) State	(g) Applied Amount

2019 Locality Refund Applied Information

(a) Locality	(g) Applied Amount

2019 State Tax Refund Information

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment

2019 Locality Tax Refund Information

(a) Locality	(d) Total Withheld/Pmts	(f) Total Overpayment

Michael Bickelmeyer

Other Tax and Income Information			2019	2020
1	Filing status	1		1 Single
2	Number of exemptions for blind or over 65 (0 - 4).	2		
3	Itemized deductions	3		2,741.
4	Check box if required to itemize deductions	4	<input type="checkbox"/>	<input type="checkbox"/>
5	Adjusted gross income	5		54,041.
6	Tax liability for Form 2210 or Form 2210-F	6		4,948.
7	Alternative minimum tax.	7		
8	Federal overpayment applied to next year estimated tax.	8		

QuickZoom to the IRA Information Worksheet for IRA information ▶

Excess Contributions			2019	2020
9 a	Taxpayer's excess Archer MSA contributions as of 12/31	9 a		
b	Spouse's excess Archer MSA contributions as of 12/31	b		
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31.	10 a		
b	Spouse's excess Coverdell ESA contributions as of 12/31.	b		
11 a	Taxpayer's excess HSA contributions as of 12/31	11 a		
b	Spouse's excess HSA contributions as of 12/31	b		

Loss and Expense Carryovers

Note: Enter all entries as a positive amount

Loss and Expense Carryovers			2019	2020
12 a	Short-term capital loss.	12 a		
b	AMT Short-term capital loss	b		
13 a	Long-term capital loss	13 a		
b	AMT Long-term capital loss	b		
14 a	Net operating loss available to carry forward	14 a		
b	AMT Net operating loss available to carry forward	b		
15 a	Investment interest expense disallowed	15 a		
b	AMT Investment interest expense disallowed	b		
16	Nonrecaptured net Section 1231 losses from:			
	a 2020.	16 a		
	b 2019.	b		
	c 2018.	c		
	d 2017.	d		
	e 2016.	e		
	f 2015.	f		
17	AMT Nonrecap'd net Sec 1231 losses from:			
	a 2020.	17 a		
	b 2019.	b		
	c 2018.	c		
	d 2017.	d		
	e 2016.	e		
	f 2015.	f		

Name(s) Shown on Return
Michael BickelmeyerSocial Security Number
[REDACTED]

Description	Amount
Income	
Wages	54,753.
Interest income before Series EE bond exclusion	
Dividend income	
Tax refund	
Alimony received	
Nonpassive business income or loss	
Royalty and nonpassive rental activities income or loss	
Nonpassive partnership income or loss	
Nonpassive S corporation income or loss	
Nonpassive farm rental income or loss	
Nonpassive farm income or loss	
Nonpassive estate and trust income or loss	
Real estate mortgage investment conduits	
Business gains and losses from nonpassive activities	
Capital gains and losses	
Taxable IRA distributions	
Taxable pension distributions	
Unemployment compensation	
Other income	
Total income	54,753.
Adjustments	
Educator expenses	
Certain business expenses of reservists, performing artists, and government officials	
Health savings account deduction	
Moving expenses	
Self-employed SEP, SIMPLE, and qualified plans	
Self-employed health insurance deduction	
Penalty on early withdrawals of savings	
Alimony paid	
Other adjustments	
Total adjustments	
Modified adjusted gross income	54,753.

Two-Year Comparison

2020

Name(s) Shown on Return
Michael Bickelmeyer

Social Security Number

Income	2019	2020	Difference	%
Wages, salaries, tips, etc.		54,753.	54,753.	
Interest and dividend income				
State tax refund				
Business income (loss)				
Capital and other gains (losses)				
IRA distributions				
Pensions and annuities				
Rents and royalties				
Partnerships, S Corps, etc				
Farm income (loss)				
Social security benefits				
Income other than the above				
Total Income		54,753.	54,753.	
Adjustments to Income		712.	712.	
Adjusted Gross Income		54,041.	54,041.	
Itemized Deductions				
Medical and dental				
Income or sales tax		1,821.	1,821.	
Real estate taxes		920.	920.	
Personal property and other taxes				
Interest paid				
Gifts to charity				
Casualty and theft losses				
Miscellaneous				
Total Itemized Deductions	0.	2,741.	2,741.	
Standard or Itemized Deduction		12,400.	12,400.	
Qualified Business Income Deduction				
Taxable Income		41,641.	41,641.	
Income tax		4,948.	4,948.	
Additional income taxes				
Alternative minimum tax				
Total Income Taxes		4,948.	4,948.	
Nonbusiness credits				
Business credits				
Total Credits				
Self-employment tax				
Other taxes		217.	217.	
Total Tax After Credits		5,165.	5,165.	
Withholding		5,239.	5,239.	
Estimated and extension payments				
Earned income credit				
Additional child tax credit				
Other payments				
Total Payments		5,239.	5,239.	
Form 2210 penalty				
Applied to next year's estimated tax				
Refund		74.	74.	
Balance Due				

Current year effective tax rate 9.16%

Tax Summary
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2020

Name (s)	
Michael Bickelmeyer	
Total income	54,753.
Adjustments to income	712.
Adjusted gross income	54,041.
Itemized/standard deduction	12,400.
Qualified business income deduction	
Taxable income	41,641.
Tentative tax	4,948.
Additional taxes	
Alternative minimum tax	
Total credits	
Other taxes	217.
Total tax	5,165.
Total payments	5,239.
Estimated tax penalty	
Amount Overpaid	74.
Refund	74.
Amount Applied to Estimate	
Balance due	0.