

# Federal Electronic Filing Instructions

Tax Year 2020

**You are responsible for confirming the status of your electronically filed return.** You can confirm the status of your return by going to <https://www.taxact.com/ef/efile-center>. You will need to enter the primary social security number and last name on the return along with your ZIP code.

**Self Select PIN:** You do not need to mail any paper signature forms to the IRS. Your return has been successfully filed once you receive your acceptance from the IRS.

**Balance Due:**

A direct withdrawal of the balance due (\$324) will be scheduled for March 9, 2021 once the return is accepted by the IRS.

**Filing Status**
☒ Single
 ☐ Married filing jointly
 ☐ Married filing separately (MFS)
 ☐ Head of household (HOH)
 ☐ Qualifying widow(er) (QW)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial <b>KAREN L</b>		Last name <b>CHU</b>	Your social security number <b>6935</b>	
If joint return, spouse's first name and middle initial		Last name	Spouse's social security number	

Home address (number and street). If you have a P.O. box, see instructions.  
**1233 YORK AVE**  
 City, town, or post office. If you have a foreign address, also complete spaces below.  
**NEW YORK**

State  
**NY**

ZIP code  
**10065**

Apt. no.  
**20H**

**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.  
☐ You ☐ Spouse  
☐ Yes ☒ No

Foreign country name
 Foreign province/state/county
 Foreign postal code

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?  
☐ 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, 1956 ☐ Are blind
 Spouse: ☐ Was born before January 2, 1956 ☐ Is blind

**Dependents** (see instructions):
 

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see instructions):	
				Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Attach Sch. B if required.

1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	34,128.
2a	Tax-exempt interest	2a	
3a	Qualified dividends	3a	2.
4a	IRA distributions	4a	
5a	Pensions and annuities	5a	
6a	Social security benefits	6a	
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here. ▶ <input type="checkbox"/>	7	23.
8	Other income from Schedule 1, line 9	8	
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> ▶	9	45,421.
10	Adjustments to income:		
a	From Schedule 1, line 22.	10a	
b	Charitable contributions if you take the standard deduction. See instructions	10b	
c	Add lines 10a and 10b. These are your <b>total adjustments to income</b> ▶	10c	0.
11	Subtract line 10c from line 9. This is your <b>adjusted gross income</b> ▶	11	45,421.
12	<b>Standard deduction or itemized deductions</b> (from Schedule A)	12	12,400.
13	Qualified business income deduction. Attach Form 8995 or Form 8995-A	13	
14	Add lines 12 and 13	14	12,400.
15	<b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0-	15	33,021.

**Standard Deduction for -**

- Single or married filing separately, \$12,400
- Married filing jointly or Qualifying widow(er), \$24,800
- Head of household, \$18,650
- If you checked any box under Standard Deduction, see instructions.

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	16	3,766.
17	Amount from Schedule 2, line 3	17	
18	Add lines 16 and 17	18	3,766.
19	Child tax credit or credit for other dependents	19	
20	Amount from Schedule 3, line 7	20	
21	Add lines 19 and 20	21	0.
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	3,766.
23	Other taxes, including self-employment tax, from Schedule 2, line 10	23	
24	Add lines 22 and 23. This is your <b>total tax</b>	24	3,766.
25	Federal income tax withheld from:		
a	Form(s) W-2	25a	3,442.
b	Form(s) 1099	25b	
c	Other forms (see instructions)	25c	
d	Add lines 25a through 25c	25d	3,442.
26	2020 estimated tax payments and amount applied from 2019 return	26	
27	Earned income credit (EIC). NO	27	
28	Additional child tax credit. Attach Schedule 8812	28	
29	American opportunity credit from Form 8863, line 8	29	
30	Recovery rebate credit. See instructions	30	
31	Amount from Schedule 3, line 13	31	
32	Add lines 27 through 31. These are your <b>total other payments and refundable credits</b>	32	0.
33	Add lines 25d, 26, and 32. These are your <b>total payments</b>	33	3,442.
34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b>	34	0.
35a	Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here <input type="checkbox"/>	35a	0.
b	Routing number XXXXXX	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number XXXXXX		
36	Amount of line 34 you want <b>applied to your 2021 estimated tax</b>	36	
37	Subtract line 33 from line 24. This is the <b>amount you owe now</b> Note: Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.	37	324.
38	Estimated tax penalty (see instructions)	38	

**Refund**Direct deposit?  
See instructions.**Amount You Owe**

For details on how to pay, see instructions.

**Third Party Designee**

Do you want to allow another person to discuss this return with the IRS?

See instructions ☐ Yes. Complete below. ☐ NoDesignee's  
name ▶Phone  
no. ▶Personal identification  
number (PIN) ▶**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.) ▶

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.) ▶

Phone no. (415) 513-9489

Email address

**Paid Preparer Use Only**

Preparer's name

Preparer's signature

Date

PTIN

Check if:

☐ Self-employed

Firm's name ▶

Phone no.

Firm's address ▶

Firm's EIN ▶

Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Form 1040 (2020)

UYA

**SCHEDULE B**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Interest and Ordinary Dividends**

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

OMB No. 1545-0074

**2020**

Attachment  
Sequence No. **08**

Name(s) shown on return

KAREN L CHU

Your social security number

6935

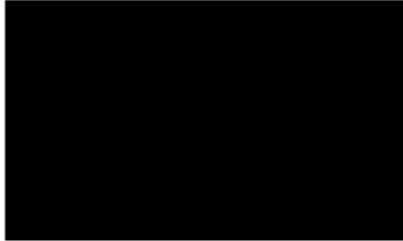
**Part I**

**Interest**

(See instructions  
and the  
instructions for  
Forms 1040 and  
1040-SR, line 2b.)

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

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



**Amount**

2,743.  
2,798.  
1,293.  
2,388.  
500.  
1,042.  
501.

**1**

- 2** Add the amounts on line 1. . . . .  
**3** Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815 . . . . .  
**4** Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b. . . . . ►

**2**

11,265.

**3**

**4**

11,265.

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

**Amount**

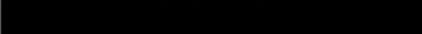
**Part II**

**Ordinary Dividends**

(See instructions  
and the  
instructions for  
Forms 1040 and  
1040-SR, line 3b.)

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

- 5** List name of payer ►



3.  
2.

**5**

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

**6**

5.

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

**Part III**

**Foreign Accounts and Trusts**

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

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a** At any time during 2020, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions. . . . .

Yes No

X

If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements. . . . .

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

- 8** During 2020, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions. . . . .

X

**SCHEDULE D**  
**(Form 1040)**Department of the Treasury  
Internal Revenue Service (99)**Capital Gains and Losses**

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

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

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074

**2020**Attachment  
Sequence No. **12**

Name(s) shown on return

**KAREN L CHU**

Your social security number

**6935**Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes ☒ No  
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.**Part I Short-Term Capital Gains and Losses — Generally Assets Held One Year or Less** (see instructions)

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>1a</b> Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b . . . . .	2,138.	2,116.		22.
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .				
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .	37.	36.		1.
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .				
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				<b>4</b>
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .				<b>5</b>
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .				<b>6</b> ( )
<b>7</b> <b>Net short-term capital gain or (loss).</b> Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2 . . . . .				<b>7</b> 23.

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>8a</b> Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b . . . . .				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .				
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .				
<b>11</b> Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824 . . . . .				<b>11</b>
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 . . . . .				<b>12</b>
<b>13</b> Capital gain distributions. See the instructions . . . . .				<b>13</b>
<b>14</b> Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions . . . . .				<b>14</b> ( )
<b>15</b> <b>Net long-term capital gain or (loss).</b> Combine lines 8a through 14 in column (h). Then, go to Part III on page 2 . . . . .				<b>15</b> 0.

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

UYA

03/06/2021 05:55:32PM

Schedule D (Form 1040) 2020

**Part III Summary**

<b>16</b>	Combine lines 7 and 15 and enter the result . . . . .	<b>16</b>	23.
	<ul style="list-style-type: none"> <li>• If line 16 is a <b>gain</b>, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below.</li> <li>• If line 16 is a <b>loss</b>, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22.</li> <li>• If line 16 is <b>zero</b>, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.</li> </ul>		
<b>17</b>	Are lines 15 and 16 <b>both</b> gains? <input type="checkbox"/> <b>Yes.</b> Go to line 18. <input checked="" type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.		
<b>18</b>	If you are required to complete the <b>28% Rate Gain Worksheet</b> (see instructions), enter the amount, if any, from line 7 of that worksheet . . . . . ▶	<b>18</b>	0.
<b>19</b>	If you are required to complete the <b>Unrecaptured Section 1250 Gain Worksheet</b> (see instructions), enter the amount, if any, from line 18 of that worksheet . . . . . ▶	<b>19</b>	0.
<b>20</b>	Are lines 18 and 19 both zero or blank and are you not filing Form 4952? <input type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16. <b>Don't</b> complete lines 21 and 22 below.  <input type="checkbox"/> <b>No.</b> Complete the <b>Schedule D Tax Worksheet</b> in the instructions. <b>Don't</b> complete lines 21 and 22 below.		
<b>21</b>	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the <b>smaller</b> of:  <div style="display: flex; align-items: center;"> <ul style="list-style-type: none"> <li>• The loss on line 16; or</li> <li>• (\$3,000), or if married filing separately, (\$1,500)</li> </ul> <div style="font-size: 3em; margin: 0 10px;">}</div> <div style="border-bottom: 1px solid black; width: 150px; flex-grow: 1;"></div> </div> <p><b>Note:</b> When figuring which amount is smaller, treat both amounts as positive numbers.</p>	<b>21</b>	( )
<b>22</b>	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?  <input checked="" type="checkbox"/> <b>Yes.</b> Complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> in the instructions for Forms 1040 and 1040-SR, line 16.  <input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

**Sales and Other Dispositions of Capital Assets**► Go to [www.irs.gov/Form8949](http://www.irs.gov/Form8949) for instructions and the latest information.

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

**2020**Attachment  
Sequence No. **12A**

Name(s) shown on return

**KAREN L CHU**

Social security number or taxpayer identification number

**6935**

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 (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the <b>Note</b> 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	
		11/06/2020	11/17/2020	27.	26.			1.
		11/10/2020	11/17/2020	2.	2.			
		11/16/2020	11/17/2020	8.	8.			
<b>2 Totals.</b> Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if <b>Box A</b> above is checked), line 2 (if <b>Box B</b> above is checked), or line 3 (if <b>Box C</b> above is checked) ►				37.	36.			1.

**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.



# New York Electronic Filing Instructions

These instructions are provided to help you understand and complete the final steps for successfully electronically filing your New York return. We highly recommend you print this for your reference.

**You are responsible for confirming the status of your electronically filed return.** You can confirm the status of your return by going to <https://www.taxact.com/ef/efile-center>. You will need to enter the Primary Social Security Number, Last Name, and ZIP Code from the return.

## **Signature Document:**

You do not need to mail any paper signature forms to New York. Your return has been successfully filed once you receive your acceptance from the New York State Tax Department.

## **Balance Due:**

A Direct Withdrawal of the balance due has been submitted to the New York State Tax Department and will be scheduled for March 9, 2021 once the return is accepted.

If you are unable to complete the above instructions, or you need assistance in completing them, contact us at: [efilesupport@taxact.com](mailto:efilesupport@taxact.com).



Name(s) shown on return

KAREN L CHU

Your social security number

6935

## WARNING: UNAVAILABLE FORMS FOR PAPER FILERS

This New York return contains one or more of the following forms that have not yet been approved by the New York Department of Taxation. You may file this return electronically now but you cannot file it as a ***printed and mailed-in return***. A program update will be released when the form(s) below are approved for paper filing:

Form IT 201 - NY Resident Income Tax Return

# EFILE COPY



Department of Taxation and Finance

**Resident Income Tax Return**

New York State • New York City • Yonkers • MCTMT

**IT-201**

For the full year January 1, 2020, through December 31, 2020, or fiscal year beginning . . . and ending . . .

20

For help completing your return, see the instructions, Form IT-201-I.

Your first name	MI	Your last name (for a joint return, enter spouse's name on line below)	Your date of birth (mmddyyyy)	Your Social Security number
KAREN	L	CHU	09271988	██████████ 5935
Spouse's first name	MI	Spouse's last name	Spouse's date of birth (mmddyyyy)	Spouse's Social Security number
Mailing address (see instructions, page 14) (number and street or PO box)			Apartment number	New York State county of residence
1233 YORK AVE			20H	NEW YORK
City, village, or post office		State	ZIP code	Country (if not United States)
NEW YORK		NY	10065	
Taxpayer's permanent home address (see instructions, page 14) (number and street or rural route)			Apartment number	School district name
1233 YORK AVE			20H	MANHATTAN
City, village, or post office		State	ZIP code	School district code number
NEW YORK		NY	10065	369
Decedent information			Taxpayer's date of death (mmddyyyy)	Spouse's date of death (mmddyyyy)

- A Filing status -** (mark an X in one box):
- ① ☒ Single
- ② ☐ Married filing joint return (enter spouse's Social Security number above)
- ③ ☐ Married filing separate return (enter spouse's Social Security number above)
- ④ ☐ Head of household (with qualifying person)
- ⑤ ☐ Qualifying widow(er)

**B** Did you itemize your deductions on your 2020 federal income tax return? . . . . Yes ☐ No ☒

**C** Can you be claimed as a dependent on another taxpayer's federal return? . . . . Yes ☐ No ☒



**D1** Did you have a financial account located in a foreign country? (see page 15) . . . . . Yes ☐ No ☒

**D2** Were you required to report any nonqualified deferred compensation, as required by IRC § 457A, on your 2020 federal return? (see page 15). . . . . Yes ☐ No ☒

**E** (1) Did you or your spouse maintain living quarters in NYC during 2020? (see page 15) Yes ☐ No ☐  
(2) Enter the number of days spent in NYC in 2020 (any part of a day spent in NYC is considered a day) . . . . .

**F** NYC residents and NYC part-year residents only (see page 15):  
(1) Number of months you lived in NYC in 2020 . . . . . 12

(2) Number of months your spouse lived in NYC in 2020 . . . . .

**G** Enter your 2-character special condition code(s) if applicable (see page 15) . . . . .

**H Dependent information** (see page 16)

First name	MI	Last name	Relationship	Social Security number	Date of birth (mmddyyyy)

If more than 7 dependents, mark an X in the box. ☐

201001201064



For office use only

NO HANDWRITTEN ENTRIES, OTHER THAN SIGNATURE ON THIS FORM

6935

**Federal income and adjustments** (see page 16)

Whole dollars only

1	Wages, salaries, tips, etc.	1	34128.00
2	Taxable interest income	2	11265.00
3	Ordinary dividends	3	5.00
4	Taxable refunds, credits, or offsets of state and local income taxes (also enter on line 25)	4	.00
5	Alimony received	5	.00
6	Business income or loss (submit a copy of federal Schedule C, Form 1040)	6	.00
7	Capital gain or loss (if required, submit a copy of federal Schedule D, Form 1040)	7	23.00
8	Other gains or losses (submit a copy of federal Form 4797)	8	.00
9	Taxable amount of IRA distributions. If received as a beneficiary, mark an X in the box <input type="checkbox"/>	9	.00
10	Taxable amount of pensions and annuities. If received as a beneficiary, mark an X in the box <input type="checkbox"/>	10	.00
11	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (submit copy of federal Schedule E, Form 1040)	11	.00
12	Rental real estate included in line 11	12	.00
13	Farm income or loss (submit a copy of federal Schedule F, Form 1040)	13	.00
14	Unemployment compensation	14	.00
15	Taxable amount of Social Security benefits (also enter on line 27)	15	.00
16	Other income (see page 16) Identify:	16	.00
17	Add lines 1 through 11 and 13 through 16	17	45421.00
18	Total federal adjustments to income (see page 16) Identify:	18	.00
19	Federal adjusted gross income (subtract line 18 from line 17)	19	45421.00
19a	Recomputed federal adjusted gross income (see page 16, Line 19a worksheet)	19a	45421.00

**New York additions** (see page 17)

20	Interest income on state and local bonds and obligations (but not those of NYS or its local governments)	20	.00
21	Public employee 414(h) retirement contributions from your wage and tax statements (see page 17)	21	.00
22	New York's 529 college savings program distributions (see page 17)	22	.00
23	Other (Form IT-225, line 9)	23	.00
24	Add lines 19a through 23	24	45421.00

**New York subtractions** (see page 18)

25	Taxable refunds, credits, or offsets of state and local income taxes (from line 4)	25	.00
26	Pensions of NYS and local governments and the federal government (see page 18)	26	.00
27	Taxable amount of Social Security benefits (from line 15)	27	.00
28	Interest income on U.S. government bonds	28	.00
29	Pension and annuity income exclusion (see page 19)	29	.00
30	New York's 529 college savings program deduction/earnings	30	.00
31	Other (Form IT-225, line 18)	31	.00
32	Add lines 25 through 31	32	.00
33	New York adjusted gross income (subtract line 32 from line 24)	33	45421.00

**Standard deduction or itemized deduction** (see page 21)

34	Enter your <b>standard deduction</b> (table on page 21) or your <b>itemized deduction</b> (from Form IT-196) Mark an X in the appropriate box: <input checked="" type="checkbox"/> <b>Standard</b> - or - <input type="checkbox"/> <b>Itemized</b>	34	8000.00
35	Subtract line 34 from line 33 (if line 34 is more than line 33, leave blank)	35	37421.00
36	Dependent exemptions (enter the number of dependents listed in item H; see page 21)	36	000.00
37	<b>Taxable income</b> (subtract line 36 from line 35)	37	37421.00

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Name(s) as shown on page 1  
KAREN L CHU

Your Social Security number  
[REDACTED] 6935

**Tax computation, credits, and other taxes**

<b>38</b>	<b>Taxable income</b> (from line 37 on page 2) . . . . .	<b>38</b>	37421.00
<b>39</b>	<b>NYS tax on line 38 amount</b> (see page 22) . . . . .	<b>39</b>	2018.00
<b>40</b>	<b>NYS household credit</b> (page 22, table 1, 2, or 3) . . . . .	<b>40</b>	.00
<b>41</b>	<b>Resident credit</b> (see page 23) . . . . .	<b>41</b>	.00
<b>42</b>	<b>Other NYS nonrefundable credits</b> (Form IT-201-ATT, line 7) . . . . .	<b>42</b>	.00
<b>43</b>	<b>Add lines 40, 41, and 42.</b> . . . . .	<b>43</b>	.00
<b>44</b>	<b>Subtract line 43 from line 39</b> (if line 43 is more than line 39, leave blank) . . . . .	<b>44</b>	2018.00
<b>45</b>	<b>Net other NYS taxes</b> (Form IT-201-ATT, line 30) . . . . .	<b>45</b>	.00
<b>46</b>	<b>Total New York State taxes</b> (add lines 44 and 45) . . . . .	<b>46</b>	2018.00

**New York City and Yonkers taxes, credits, and surcharges, and MCTMT**

<b>47</b>	<b>NYC taxable income</b> (see page 23) . . . . .	<b>47</b>	37421.00
<b>47a</b>	<b>NYC resident tax on line 47 amount</b> (see page 23) . . . . .	<b>47a</b>	1333.00
<b>48</b>	<b>NYC household credit</b> (page 23) . . . . .	<b>48</b>	.00
<b>49</b>	<b>Subtract line 48 from line 47a</b> (if line 48 is more than line 47a, leave blank) . . . . .	<b>49</b>	1333.00
<b>50</b>	<b>Part-year NYC resident tax</b> (Form IT-360.1) . . . . .	<b>50</b>	.00
<b>51</b>	<b>Other NYC taxes</b> (Form IT-201-ATT, line 34) . . . . .	<b>51</b>	.00
<b>52</b>	<b>Add lines 49, 50, and 51.</b> . . . . .	<b>52</b>	1333.00
<b>53</b>	<b>NYC nonrefundable credits</b> (Form IT-201-ATT, line 10) . . . . .	<b>53</b>	.00
<b>54</b>	<b>Subtract line 53 from line 52</b> (if line 53 is more than line 52, leave blank) . . . . .	<b>54</b>	1333.00
<b>54a</b>	<b>MCTMT net earnings base</b> <b>54a</b> . . . . .		.00
<b>54b</b>	<b>MCTMT</b> . . . . .	<b>54b</b>	.00
<b>55</b>	<b>Yonkers resident income tax surcharge</b> (see page 26) . . . . .	<b>55</b>	.00
<b>56</b>	<b>Yonkers nonresident earnings tax</b> (Form Y-203) . . . . .	<b>56</b>	.00
<b>57</b>	<b>Part-year Yonkers resident income tax surcharge</b> (Form IT-360.1) . . . . .	<b>57</b>	.00
<b>58</b>	<b>Total New York City and Yonkers taxes / surcharges and MCTMT</b> (add lines 54 and 54b through 57) . . . . .	<b>58</b>	1333.00
<b>59</b>	<b>Sales or use tax</b> (see page 27; do not leave line 59 blank) . . . . .	<b>59</b>	0.00
<b>60</b>	<b>Voluntary contributions</b> (Form IT-227, Part 2, line 1) . . . . .	<b>60</b>	.00
<b>61</b>	<b>Total New York State, New York City, Yonkers, and sales or use taxes, MCTMT, and voluntary contributions</b> (add lines 46, 58, 59, and 60) . . . . .	<b>61</b>	3351.00

See instructions on pages 23 through 26 to compute New York City and Yonkers taxes, credits, and surcharges, and MCTMT.



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Your Social Security number

6935

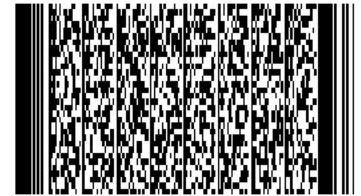
62 Enter amount from line 61. . . . .

62

3351.00

**Payments and refundable credits** (see pages 28 through 31)

63	Empire State child credit. . . . .	63	.00
64	NYS/NYC child and dependent care credit. . . . .	64	.00
65	NYS earned income credit (EIC) . . . . .	65	.00
66	NYS noncustodial parent EIC . . . . .	66	.00
67	Real property tax credit . . . . .	67	.00
68	College tuition credit . . . . .	68	.00
69	NYC school tax credit (fixed amount) (also complete F on page 1). . . . .	69	63.00
69a	NYC school tax credit (rate reduction amount). . . . .	69a	79.00
70	NYC earned income credit. . . . .	70	.00
70a	This line intentionally left blank . . . . .	70a	
71	Other refundable credits (Form IT-201-ATT, line 18). . . . .	71	.00
72	Total New York State tax withheld . . . . .	72	1757.00
73	Total New York City tax withheld. . . . .	73	1344.00
74	Total Yonkers tax withheld . . . . .	74	.00
75	Total estimated tax payments and amount paid with Form IT-370 . . . . .	75	.00
76	Total payments (add lines 63 through 75). . . . .	76	3243.00



If applicable, complete Form(s) IT-2 and/or IT-1099-R and submit them with your return (see page 13).  
Do not send federal Form W-2 with your return.

**Your refund, amount you owe, and account information** (see pages 32 through 34)

77	Amount overpaid (if line 76 is more than line 62, subtract line 62 from line 76; see page 32) . . . . .	77	.00
78	Amount of line 77 available for refund (subtract line 79 from line 77) . . . . .	78	.00
78a	Amount of line 78 that you want to deposit into a NYS 529 account (Form IT-195, line 4) (also submit Form IT-195) . . . . .	78a	.00
78b	Total refund after NYS 529 account deposit (subtract line 78a from line 78) . . . . .	78b	.00

Mark one refund choice: ☐ direct deposit to checking or savings account (fill in line 83) -or- ☐ paper check

Refund? Direct deposit is the easiest, fastest way to get your refund.

79	Amount of line 77 that you want applied to your 2021 estimated tax (see instructions) . . . . .	79	.00
80	Amount you owe (if line 76 is less than line 62, subtract line 76 from line 62). To pay by electronic funds withdrawal, mark an X in the box <input checked="" type="checkbox"/> and fill in lines 83 and 84. If you pay by check or money order you must complete Form IT-201-V and mail it with your return. . . . .	80	108.00

See page 33 for payment options.

81	Estimated tax penalty (include this amount in line 80 or reduce the overpayment on line 77; see page 33) . . . . .	81	.00
82	Other penalties and interest (see page 33) . . . . .	82	.00

See page 36 for the proper assembly of your return.

83 Account information for direct deposit or electronic funds withdrawal (see page 34).

If the funds for your payment (or refund) would come from (or go to) an account outside the U.S., mark an X in this box (see pg. 34) . . . . . ☐

83a Account type: ☒ Personal checking -or- ☐ Personal savings -or- ☐ Business checking -or- ☐ Business savings

83b Routing number  83c Account number  0395

84 Electronic funds withdrawal (see page 34) . . . . . Date  03092021 Amount  108.00

Third-party designee? (see instr.) Yes <input type="checkbox"/> No <input type="checkbox"/>	Print designee's name	Designee's phone number	Personal identification number (PIN)
	Email:		

▼ Paid preparer must complete ▼ (see instructions)		Preparer's NYTPRIN	NYTPRIN excl. code
Preparer's signature	Preparer's printed name		
Firm's name (or yours, if self-employed)	Preparer's PTIN or SSN		
Address	Employer identification number		
	Date		
Email:			

▼ Taxpayer(s) must sign here ▼	
Your signature	
Your occupation WEILL CORNELL PHD STUDENT	
Spouse's signature and occupation (if joint return)	
Date	Daytime phone number 415 513 9489
Email:	

See instructions for where to mail your return.

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