

2025 Form 6 - Full and Public Disclosure of Financial Interests

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2025 JUN -8 AM 11:35

DIVISION OF ELECTIONS
TALLAHASSEE, FL

General Information

Name: Ms Lauren Joelle Donahoo

Organization	Suborganization	Title
N/A		

CANDIDATE FOR

Position	Agency Name	Position sought or held
State Senate	Senate District 2	Senate District 2

Net Worth

My Net Worth as of December 31, 2025 was -\$ 128,500.00.

Assets

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use.

The aggregate value of my household goods and personal effect is \$ 27,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
N/A	

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Ally Auto	6125 Lakeview Rd, Suite 800, Charlotte, NC 28269	\$ 20,624.27

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

Income

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2025 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☒ I elect to file a copy of my 2025 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

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

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

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

Interests in Specified Businesses

Business Entity # 1

N/A

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

Lauren Joelle Donahoo

Digitally signed: 06/04/2026

W-2 Transcript

Disclaimer: This document was generated by TurboTax using data retrieved from your connected financial account. For informational purposes only not an official tax form or statement issued by your financial institution.

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DIVISION OF ELECTIONS
TALLAHASSEE, FL

Tax Year: 2025

Corrected:

Void:

a

b

Duplicate Information from Box 16

State:

Employer's state ID number:

c Employer's Name, Address and Zip Code

Name Line 1: CRC Health Treatment Clinics, LL

Name Line 2:

Address Line 1: 6639 Southpoint Parkway, Suite 107

City: Jacksonville

State: FL

Zip Code: 32216

d Control Number:

e Employee's First name, Initial, Last Name & Suffix

First Name: Lauren

Initial:

Last Name: Donahoo

Suffix:

f Employee's Address and Zip Code

Address Line 1: 6216 Browning Street

City: Milton

State: FL

Zip Code: 32570

1 Wages, Tips, Other Compensation: \$ 44,621.64

2 Federal Income Tax Withheld: \$ 3,085.31

3 Social Security Wages: \$ 44,621.64

4 Social Security Tax Withheld: \$ 2,766.54

5 Medicare Wages and Tips: \$ 44,621.64

6 Medicare Tax Withheld: \$ 647.01

7 Social Security Tips:

8 Allocated Tips:

9 Advanced EIC Payment:

W-2 Transcript

10 Dependent Care Benefits:

11 Nonqualified Plans:

Box 12 Code	Box 12 amt
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AA	\$ 194.10
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DD	\$ 20,201.52
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13 Statutory Employee:
Retirement Plan: X
Third-party Sick Pay:

14 Other		
desc:	DEFCOMP	SEC125
amt:	\$ 194.10	\$ 4,791.60

15 Standard or Non-standard Code:

State and Local

16 State
Employer's State ID Number

17 State Wages, Tips etc

18 State Income Tax

19 Local Wages, Tips etc

20 Local Income Tax

21 Locality Name

Other

22 W-2 Download Code:

23 W-2 Download Result Code:

24 W-2 Download Failed Attempt Count:

25 W-2 Hashcode:

Intuit Payments Inc, a subsidiary of Intuit Inc., a Delaware corporation
Refund Processing Agreement ("Agreement")

Name: Lauren J Donahoo

Social Security No.:

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This Agreement contains important terms, conditions and disclosures about the program for processing of your refund(s) (the "Program") by Intuit Payments Inc, a subsidiary of Intuit Inc., a Delaware corporation ("IPI", "we", "our", or "us") using an account created for you at a partner financial institution, such as Cross River Bank ("Bank"). The Program consists of two services: (i) the "Early Refund Processing Service" or "ERPS", and (ii) the "Refund Processing Service" or "RPS." You can opt to receive either ERPS only, or both ERPS and RPS, subject to eligibility. If you participate in ERPS, you have chosen to receive your federal and/or state tax refund up to five (5) days early. If you also choose to participate in RPS, then you have chosen to pay for any TurboTax tax preparation and filing service fees ("Prep and Filing Fees") from the proceeds of your federal and/or state tax refund.

Read this Agreement carefully before accepting its terms and conditions, and print a copy and/or retain this information electronically for future reference. As used in this Agreement, the words "you" and "your" refer to the applicant or both the applicant and joint applicant if the 2025 federal and/or state income tax return(s) is a joint return (individually and collectively, "Applicant"). The words "we," "us" and "our" refer to IPI. The ERPS and RPS include money transfer services provided by IPI, which is licensed as a money transmitter in the U.S. jurisdictions listed at: <https://www.intuit.com/legal/licenses/payment-licenses/>. While the ERPS and RPS are provided by IPI, under certain circumstances, IPI may not be required to provide such services under its money transmitter licenses.

1. NOTICES.

YOU ARE NOT REQUIRED TO USE THE ERPS OR THE RPS IN ORDER TO FILE ELECTRONICALLY.

YOU UNDERSTAND THAT AN ERPS FEE OF \$35.00 IS CHARGED BY IPI TO ESTABLISH A TEMPORARY ROUTER ACCOUNT TO RECEIVE YOUR FEDERAL AND/OR STATE TAX REFUND, TO PROCESS IT, TO DEDUCT THE ERPS FEE, AND OTHER AUTHORIZED FEES FROM THAT ACCOUNT, AND TO FORWARD FUNDS TO YOU VIA THE DISBURSEMENT METHOD AS STATED BELOW. YOU ARE NOT REQUIRED TO USE THE ERPS. THE EARLY REFUND PROCESSING SERVICE IS NOT A LOAN; THE FEE IS COLLECTED ONLY AT THE TIME THE EARLY REFUND PROCESSING SERVICE OCCURS. YOU CAN AVOID THIS FEE AND NOT USE THE EARLY REFUND PROCESSING SERVICE BY INSTEAD CHOOSING ANOTHER REFUND DEPOSIT METHOD AT THE TIME YOU FILE YOUR 2025 FEDERAL INCOME TAX RETURN AND ELECTING TO HAVE YOUR REFUND(S) DIRECTLY DEPOSITED IN YOUR OWN BANK ACCOUNT OR MAILED TO YOU. IF YOU DO USE THE EARLY REFUND PROCESSING SERVICE, YOU CAN EXPECT TO RECEIVE THE PROCEEDS FROM YOUR FEDERAL AND/OR STATE TAX REFUND(S) UP TO 5 DAYS EARLIER THAN THE TYPICAL 21 DAYS FROM WHEN THE INTERNAL REVENUE SERVICE ("IRS") ACCEPTS YOUR RETURN(S) UNLESS THERE ARE PROCESSING DELAYS OR UNLESS YOUR RETURN(S) CONTAINS EARNED INCOME TAX CREDIT OR ADDITIONAL CHILD TAX CREDIT, IN WHICH CASE THE IRS WILL ISSUE YOUR REFUND(S) NO EARLIER THAN FEBRUARY 15, 2026. PLEASE CONSULT YOUR APPLICABLE STATE TAXING AUTHORITY'S WEBSITE FOR DETAILS ON WHEN YOU CAN EXPECT TO RECEIVE YOUR STATE TAX REFUND(S). IF YOU SELECT ERPS YOU WILL RECEIVE YOUR FEDERAL AND/OR STATE REFUND PROCEEDS AT LEAST ONE (1) DAY EARLY OR YOU WILL NOT BE CHARGED FOR THE ERPS SERVICE. THE COST OF PREPARING YOUR TAX RETURN(S) WILL NOT INCREASE OR DECREASE IF YOU PURCHASE THE EARLY REFUND PROCESSING SERVICE.

YOU UNDERSTAND THAT A REFUND PROCESSING FEE OF \$40.00 IS CHARGED BY US TO ESTABLISH A TEMPORARY ROUTER ACCOUNT TO RECEIVE YOUR FEDERAL AND/OR STATE TAX REFUND(S), TO PROCESS IT, TO DEDUCT YOUR TURBOTAX FEES, AND OTHER AUTHORIZED FEES FROM THAT ACCOUNT, AND TO FORWARD ANY REMAINING FUNDS TO YOU THAT YOU HAVE NOT ALREADY RECEIVED VIA THE ERPS. THE REFUND PROCESSING FEE IS NOT A LOAN; IT IS DUE TO IPI WHETHER OR NOT THE FEDERAL OR STATE TAX REFUND(S) OCCURS BUT IPI WILL NOT PURSUE COLLECTION OF THE REFUND PROCESSING FEE IF YOUR FEDERAL OR STATE TAX REFUND(S) DO NOT OCCUR. THIS FEE IS COLLECTED ONLY AT THE TIME THE REFUND(S) ARE SENT TO YOU, INCLUDING IF THE FUNDS ARE SENT TO YOU EARLY USING THE ERPS. YOU CAN AVOID THIS FEE BY NOT USING THE RPS AND INSTEAD PAYING THE APPLICABLE TURBOTAX FEES TO INTUIT INC. BY CREDIT OR DEBIT CARD AT THE TIME YOU FILE YOUR 2025 FEDERAL AND/OR STATE INCOME TAX RETURN(S) AND ELECTING TO HAVE YOUR REFUND(S) DIRECTLY DEPOSITED IN YOUR OWN BANK ACCOUNT OR MAILED TO YOU. THE RPS WILL NEITHER SPEED UP NOR DELAY YOUR FEDERAL AND/OR STATE TAX REFUND(S). THE COST OF PREPARING YOUR TAX RETURN(S) WILL NOT INCREASE OR DECREASE IF YOU PURCHASE THE REFUND PROCESSING SERVICE.

2. Authorization to Release Personal Information. You authorize the IRS and/or applicable state taxing authority to disclose any information to Bank and IPI related to the funding of your 2025 federal and/or state tax refund(s). You also authorize Intuit Inc., as the transmitter of your electronically filed tax return(s), Bank and IPI to disclose to each other certain information about you and your tax return(s) for the purpose of providing the services contemplated under this Agreement and other services offered by Intuit Inc. and its subsidiaries. You also represent that any authorizations you have made in this Section 2 have also been obtained from and are made with respect to your spouse, if this is a jointly filed return. Please see the Privacy Policy at the end of this Agreement describing how IPI may use or share your personal information.

3. Temporary Router Account Authorization and Fees. You hereby authorize us to establish a temporary router account ("Router Account") for you at Bank for the sole purpose of receiving your tax year 2025 federal and/or state tax refund(s) from the IRS or applicable state taxing authority. We must receive an acknowledgement from the IRS or applicable state taxing authority that your return(s) has been electronically filed and accepted for processing before the Router Account can be opened. All fees discussed in this Section 3 are each, a "Fee" or collectively "Fees".

By using the ERPS, you will receive your federal and/or state tax refund up to five (5) days early for an additional fee of \$35.00. IPI will deduct from the refund amount the ERPS fee, if you receive your refund proceeds at least 1 day early.

By also using the RPS, you also authorize IPI to deduct from your refund and/or Router Account amount the following amounts: (i) the Refund Processing Fee; (ii) the fees and charges related to the preparation, processing and transmission of your tax return(s) ("TurboTax Fees"); and (iii) fees for additional products and services purchased, plus applicable taxes.

You authorize us to disburse the balance of the Router Account to you after making all authorized deductions for Fees and minus any amounts you already received via the ERPS. If your refund and/or the Router Account does not have sufficient funds at the time your tax refund is processed to pay any portion of the TurboTax Fees, or if your refund proceeds are delayed (a) you authorize us to automatically deduct such Turbo Tax Fees (or any portion thereof) via ACH, electronic check, or wire transfer directly from the account into which you authorized IPI to deposit your expected tax refund proceeds as set forth in Section 6 ("Authorized Destination Account"), and (b) if you made alternative arrangements with TurboTax for payment of such Turbo Tax Fees, those arrangements will be attempted prior to any automatic deduction. You also authorize any amounts outstanding pursuant to this paragraph to be deducted from refunds you may receive up to 30 months after the date of this Agreement and processed through IPI.

Additionally, if the TurboTax Fees are not fully repaid from the Router Account for any other reason not specified above, (a) you authorize IPI to automatically deduct such Fees (or any portion thereof) or attempt to deduct such Fees for up to 4 months after your tax return was accepted via ACH, electronic check, or wire transfer directly from the Authorized Destination Account as set forth in Section 6, and (b) if you made alternative arrangements with TurboTax for payment of such Fees, those arrangements will be attempted prior to any automatic deduction. To make alternative payment arrangements or revoke your consent to automatic deduction, you must contact Intuit Inc. according to the instructions on the notices e-mailed to you by Intuit Inc. regarding outstanding amounts owed under this Agreement.

4. Acknowledgements. (a) You understand that: (i) IPI cannot guarantee the amount of your tax year 2025 federal and/or state tax refund(s) or the date it will be issued, and (ii) IPI's role is limited to the ERPS and the RPS described in this Agreement. IPI does not warrant the accuracy of the software used to prepare the tax return(s). (b) You understand that (i) Intuit Inc. is the party that sends your tax return filings to the appropriate taxing authority and provides the software used to prepare your tax return, and (ii) you agree that Intuit Inc. is not acting as your agent and is not under any fiduciary duty with respect to the processing of your refund by IPI. Intuit Inc. does not provide the ERPS or the RPS. Again, the ERPS and the RPS are provided by IPI. (c) Your refund(s) may be held or returned to the IRS or applicable state taxing authority if it is suspected of fraud or identity theft.

5. General Disclosures. The Router Account is being opened for the sole purpose of receiving your (or both spouses if this is a jointly filed return) tax year 2025 federal and/or state tax refund(s). No other deposits may be made into your Router Account. No withdrawals will be allowed from the Router Account except to collect the amounts stated in this Agreement. Without any further action by you, IPI will automatically deduct and send any funds owed to IPI under this Agreement, to IPI after receipt of your tax refund(s) into the Router Account. IPI will also automatically send any state refund(s) owed to you as well, to the extent applicable, after receipt of such tax refund(s) and deduction of any Fees owed to IPI. No interest is payable on the deposit; thus, the annual percentage yield and interest rate are 0%. The Router Account will be closed after all authorized deductions have been made. Questions or concerns about the Router Account should be directed to Intuit Inc., acting on behalf of IPI, either by telephone by calling 1-800-446-8848 or sent in writing to the address below:

Intuit, Inc
ATTN: SDE Inquiries
2535 Garcia Ave
Mountain View, CA 94043

6. Disbursement Method: You agree that the disbursement method selected below will be used by IPI to disburse funds to you.

By using the Direct Deposit method of disbursement, the balance of your refund amount, minus any authorized Fees associated with the Program, will be disbursed to you electronically by RTP or same day ACH direct disbursement to your Authorized Destination Account designated below. If your refund does not qualify to be processed with the ERPS, the entire refund amount will be sent electronically by standard ACH. If a joint return is filed, the bank account may be a joint account or the individual account of either spouse.

DIRECT DEPOSIT ACCOUNT TYPE: ☒ Checking ☐ Savings

Note: To ensure that there are no delays in receiving your refund(s), please contact your financial institution that maintains your Authorized Destination Account to confirm that you are using the correct RTN (routing) and account number. IPI and Intuit Inc. are not responsible for the misapplication of a direct disbursement that results from error, negligence or malfeasance on the part of you or your representative. In cases where Bank, on behalf of IPI, has received your federal and/or state tax refund(s) but IPI is unable to deliver the funds directly to you (including, for example, if you or your representative enter your account information incorrectly and your disbursement is returned to the Bank), funds may (i) be disbursed via a check mailed to your physical address of record, (ii) be held at Bank until claimed, or (iii) returned to the IRS or applicable state taxing authority.

Due to the risk of fraudulent diversion of tax refunds, we may not process any address or account changes for purposes of disbursing your tax refund(s). If we become aware that your address or checking or savings account has changed after you sign this Agreement but before your federal and/or state

tax refund(s) is received by us, upon receipt of your federal or state tax refund(s) from the IRS or applicable state agency, we will return your tax refund(s) to the applicable agency. We will do our best to escalate the return of your federal or state tax refund(s) to the applicable agency and you will need to work with the applicable agency directly for disbursement.

7. **ELIGIBILITY:** The availability of the ERPS is subject to: (a) your bank's participation in the Real-Time Payments (RTP) system or eligibility to receive same day ACH, (b) availability of funds for this program at the time you receive your refund, and (c) your federal and/or state tax refund is not greater than \$20,000. **You will not be charged the \$35.00 fee if (a) you select the ERPS and for any reason you are not eligible or (b) you do not receive your refund at least 1 day early.** The ERPS may change or discontinue at any time. If you are eligible for the ERPS, then you also authorize us to make all authorized deductions or payments owed to us (or our affiliates that offer TurboTax), including any Fees, prior to disbursing your federal and/or state tax refund to you up to five (5) days early.

The availability of RPS is subject to: (a) your refund being sufficient to pay your TurboTax fees and any applicable fees and (b) you are e-filing with TurboTax. **You will not be charged the \$40.00 fee if you select the RPS and for any reason you are not eligible.** The RPS may change or discontinue at any time. If you are eligible for the RPS, then you also authorize us to make all authorized deductions or payments owed to us (or our affiliates that offer TurboTax), including any Fees, prior to disbursing your tax refund(s) to you.

8. **FEDERAL ELECTRONIC FUND TRANSFER ACT DISCLOSURES:** In case of errors or questions about electronic transfers to or from the Router Account, contact us either by telephone by calling 1-800-446-8848 or write to Intuit Payments Inc c/o Intuit, Inc ATTN: SDE Inquiries 2535 Garcia Ave Mountain View, CA 94043 and provide your name, a description or explanation of the error, and the dollar amount of the suspected error. We will determine whether an error occurred within 10 business days after we hear from you and will correct any error promptly. If we need more time, however, we may take up to 45 business days to investigate your complaint or question. If we decide to do this, we will credit your Router Account within 10 business days of receiving the notice of error for the amount you think is in error, although in most circumstances you won't have use of the money until we complete our investigation. If we ask you to put your complaint or question in writing and we do not receive it within 10 business days, we may not credit your Router Account. For errors involving transfers of funds to or from the Router Account within 30 business days after the first deposit to the Router Account was made, (i) we may take up to 90 business days to investigate your complaint or question, and (ii) we may take up to 20 business days to credit your Router Account for the amount you think is in error. We will tell you the results within three business days after completing our investigation. If we decide that there was no error, we will send you a written explanation. You may ask for copies of the documents that we used in our investigation.

Business Days: Our business days are Monday through Friday, excluding federal holidays. Saturday, Sunday, and federal holidays are not considered business days, even if we are open.

Confidentiality: We will disclose information to third parties about your account or the transfers you make:

- To complete transfers as necessary;
- To verify the existence and condition of your account upon the request of a third party, such as a credit bureau or merchant;
- To comply with government agency or court orders;
- If you give us your written permission; or
- As explained in the Privacy Policy following this Agreement.

Our Liability: If we do not complete a transfer to your account on time or in the correct amount according to this Agreement, we may be liable for your losses or damages. In addition to all other limitations of liability set forth in this Agreement, we will not be liable to you if, among other things:

- Circumstances beyond our control (such as fire, flood, water damage, power failure, strike, labor dispute, pandemic, computer breakdown, telephone line disruption, or a natural disaster) prevent the transfer, despite reasonable precautions that have been taken.
- The funds in your account are subject to legal process or other claim restricting such transfer.
- You, your representative or a third party provide us with inaccurate or untimely information.

9. **Governing Law.** The enforcement and interpretation of this Agreement and the transactions contemplated herein shall be governed by the laws of the United States, including the Electronic Signatures in Global and National Commerce Act, and, to the extent state law applies, the substantive laws of Delaware.

10. Summary of Terms

Expected Refund(s)	\$	1,286.00
Less ERPS Fee	\$	35.00
Less RPS Fee	\$	40.00
Less TurboTax Fees	\$	49.00
Less Fees for Additional Products and Services Purchased	\$	89.00

* These amounts are itemized. This is only an estimate. The amount will be reduced by any applicable sales taxes. The above deductions will be subtracted from your federal or state refund(s), where applicable. Additionally, in the event one refund is insufficient to fully pay all such amounts due, deductions for the remaining amount due will be wholly or partially supplemented by, and subtracted from, the other refund (if you receive both state and federal refunds).

11. Arbitration Provision. You acknowledge that the services set forth in this Agreement are being made available and priced by IPI on the basis of your acceptance of the following arbitration provision ("Arbitration Provision"). By entering into this Agreement, you acknowledge that you are giving up the right to litigate Claims (as defined below) if you, Bank or IPI elects arbitration of the Claims pursuant to this provision, except as otherwise expressly provided herein, and you hereby knowingly and voluntarily waive the right to trial of all Claims subject to this Agreement. You further acknowledge that you have read this Arbitration Provision carefully, agree to its terms, and are entering into this Agreement voluntarily and not in reliance on any promises or representations whatsoever except those contained in this Agreement.

ARBITRATION NOTICE

THIS AGREEMENT CONTAINS AN ARBITRATION PROVISION. PLEASE READ THIS PROVISION CAREFULLY, AS IT AFFECTS YOUR LEGAL RIGHTS.

11.1. Arbitration of Claims: If you elect to seek arbitration, you must first send to IPI a written Notice of your Claim ("Notice of Claim"). The Notice of Claim to IPI should be sent in care of our registered agent Corporation Service Company, 251 Little Falls Drive, Wilmington, DE 19808. The Notice of Claim should include both the mailing address and email address you would like IPI to use to contact you. If IPI elects to seek arbitration, it will send, by certified mail, a written Notice of Claim to your address on file. A Notice of Claim must (a) describe the nature and basis of the claim or dispute; and (b) set forth the specific amount of damages or other relief sought.

You agree that good-faith informal efforts to resolve disputes often can result in a prompt, low-cost and mutually beneficial outcome. You and IPI therefore agree that, after a Notice of Claim is sent but before either you or IPI commence arbitration or file a claim in small claims court against the other, we will personally meet, via telephone or videoconference, in a good-faith effort to confer with each other and try to resolve informally any Claim covered by this Agreement. If you are represented by counsel, your counsel may participate in the conference as well, but you agree to fully participate in the conference. Likewise, if IPI is represented by counsel, its counsel may participate in the conference as well, but IPI agrees to have a company representative fully participate in the conference. The statute of limitations and any filing fee deadlines shall be tolled while the parties engage in the informal dispute resolution process required by this paragraph.

If we do not reach an agreement to resolve the Claim within sixty (60) days after the Notice of Claim is received, you or IPI may commence an arbitration proceeding by filing a Demand for Arbitration or, alternatively, by filing a Claim in small claims court. You agree that you may not commence any arbitration or file a claim in small claims court unless you and IPI are unable to resolve the claim within 60 days after we receive your completed Notice of Claim and you have made a good faith effort to resolve your claim directly with IPI during that time. If a Claim qualifies for small claims court, but a party commences an arbitration proceeding, you and IPI agree that either party may elect instead to have the Claim resolved in small claims court, and upon written notice of a party's election, the American Arbitration Association ("AAA") will administratively close the arbitration proceeding. Any dispute about whether a Claim qualifies for small claims court shall be resolved by that court, not by an arbitrator. In the event of any such dispute, the arbitration proceeding shall remain closed unless and until a decision by the small claims court that the Claim should proceed in arbitration. You may download or copy a form of notice and a form to initiate arbitration at www.adr.org or by calling 1-800-778-7879. The arbitration will be conducted by the AAA before a single AAA arbitrator under the AAA's rules, which are available at www.adr.org or by calling 1-800-778-7879, except as modified by this Agreement. Unless IPI and you agree otherwise, any arbitration hearings will take place in the county (or parish) of either your residence or of the mailing address you provided in your Notice of Claim.

11.2. Other Claims Subject to Arbitration: In addition to Claims brought by you, Claims made by anyone connected with you or anyone making a Claim through you (including a taxpayer filing jointly, employee, agent, representative, affiliated company, predecessor or successor, heir, assignee, or trustee in bankruptcy) against us shall be subject to arbitration as described herein.

11.3. Exceptions: We agree not to invoke our right to arbitrate any individual Claim you bring in small claims court or an equivalent court so long as the Claim is pending only in that court. This Arbitration Provision also does not limit or constrain our right to interplead funds in the event of claims to the Account by several parties.

11.4. Individual Claims Only: Claims may be submitted to arbitration on an individual basis only. Claims subject to this Arbitration Provision may not be joined or consolidated in arbitration with any Claim of any other person or be arbitrated on a class basis, in a representative capacity on behalf of the general public or on behalf of any other person, unless otherwise agreed to by the parties in writing. However, taxpayers filing jointly and party to this Agreement are considered as one person; IPI and its officers, directors, employees, agents, and affiliates are considered as one person; and Bank and its officers, directors, employees, agents, and affiliates are considered as one person. Further, if you have elected arbitration, unless both you and IPI agree otherwise, the arbitrator may not consolidate any other person's Claims with your Claims and may not otherwise preside over any form of a representative or class proceeding. If IPI believes that any Claim you have filed in arbitration or in court is inconsistent with the limitations in this paragraph, then you agree that we may seek an order from a court determining whether your Claim is within the scope of the Class Action Waiver. If this Class Action Waiver is found to be unenforceable, then the entirety of this Arbitration Section shall be null and void.

11.5. Arbitration Fees: Payment of all filing, administration and arbitrator fees will be governed by the AAA Rules. You are required to pay AAA's initial filing fee, but IPI will reimburse you for this filing fee at the conclusion of the arbitration to the extent it exceeds the fee for filing a complaint in a federal or state court in your county of residence or in Santa Clara County, California. If the arbitrator finds that either the substance of your Claim or the relief sought in your Demand for Arbitration was frivolous or was brought for an improper purpose (as measured by the standards set forth in Federal Rule of Civil Procedure 11(b)), then the payment of all fees will be governed by the AAA Rules and IPI will not reimburse your initial filing fee. The parties agree that the AAA has discretion to modify the amount or timing of any administrative or arbitration fees due under the AAA Rules where it deems appropriate, provided that such modification does not increase the AAA fees to you or IPI and you and IPI waive any objection to such fee modification.

11.6. Procedure: A single arbitrator will resolve the Claims. The arbitrator will be either (1) a retired judge or (2) an attorney specifically licensed to practice law in the state of California or the state of your residence and will be selected by the parties from the AAA's National Roster of arbitrators. The arbitrator will be selected using the following procedure: (a) the AAA will send the parties a list of five candidates meeting this criteria; (b) if the parties cannot agree on an arbitrator from the list, each party shall return its list to the AAA within 10 days, striking up to two candidates, and ranking the remaining candidates in order of preference; (c) the AAA shall appoint as arbitrator the candidate with the highest aggregate ranking; and (d) if for any reason the appointment cannot be made according to this procedure, the AAA may exercise its discretion in appointing the arbitrator. The arbitrator is bound by this Agreement. Except as otherwise provided below, all issues are for the arbitrator to decide, including issues relating to the scope and enforceability of this arbitration provision.

The arbitration shall follow the rules and procedures of the arbitration administrator in effect on the date the arbitration is filed, except when there is a conflict or inconsistency between the rules and procedures of the arbitration administrator and this Arbitration Provision, in which case this Arbitration Provision shall govern. Any in-person arbitration hearing for a Claim shall take place within the federal judicial district in which you live or at such other reasonably convenient location as agreed by the parties. The parties agree that an administrative conference with the AAA shall be conducted in each arbitration proceeding, and you and an IPI company representative shall appear at the administrative conference via telephone. If you fail to appear at the administrative conference, regardless of whether your counsel attends, the AAA will administratively close the arbitration proceeding without prejudice, unless you show good cause as to why you were not able to attend the conference.

The arbitrator shall issue a reasoned written decision sufficient to explain the essential findings and conclusions on which the award is based. The award shall be binding only among the parties and shall have no preclusive effect in any other arbitration or other proceeding involving a different party. IPI will not seek to recover its attorneys' fees and costs in arbitration from you unless the arbitrator finds that either the substance of your claim or the relief sought in your Demand for Arbitration was frivolous or was brought for an improper purpose (as measured by the standards set forth in Federal Rule of Civil Procedure 11(b)). Judgment on any award may be entered in any court having jurisdiction. This agreement to arbitrate shall not preclude any party to the arbitration from at any time seeking injunctions or other forms of equitable relief in aid of arbitration from a court of appropriate jurisdiction including whether a Demand for Arbitration is filed in violation of this Agreement.

12. Taxpayer Identity Validation Disclosure. To help IPI and the government identify and fight tax refund fraud, as well as fight the funding of terrorism and money laundering activities, IPI shall obtain, verify, and record information that identifies each Applicant. What this means for you: When you apply to use the ERPS for the purpose of receiving your federal tax refund(s), we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents if we need to perform additional due diligence on your account.

13. Conflicts. To the extent there is any conflict between the terms of this Agreement and the TurboTax Terms of Service available at <https://turbotax.intuit.com/corp/terms-of-use/>, the provisions of this Agreement shall control with respect to any issues concerning the Program.

YOUR AGREEMENT

IPI agrees to all of the terms of this Agreement. By selecting the "I Agree" button in TurboTax: (i) You authorize IPI and/or Bank to receive your 2025 federal and/or state tax refund(s) from the IRS or applicable state taxing authority and IPI to make the deductions from your federal and/or state refund(s) described in the Agreement, (ii) You agree to receive all communications electronically in accordance with the "Communications" section of the Tax Year 2025 TurboTax® User Agreement, (iii) You consent to the release of your 2025 federal and/or state tax refund(s) disbursement information and application information as described in this Agreement; and (iv) You acknowledge that you have reviewed, and agree to be bound by, the Agreement's terms and conditions. If this is a joint return, selecting "I Agree" indicates that both spouses agree to be bound by the terms and conditions of the Agreement.

FACTS

WHAT DOES INTUIT INC. ("INTUIT") DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: ▪ Social Security number and transaction history ▪ account balances and payment history ▪ credit history and credit scores
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Intuit chooses to share; and whether you can limit this sharing.

Reasons we can share your information	Does Intuit share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	We don't share*
For nonaffiliates to market to you	No	We don't share

Questions?

Visit us at: <https://www.intuit.com/privacy/>
 Email us at: privacy@intuit.com

Who we are

Who is providing this notice?	This notice is provided by Intuit Inc. and is applicable to your U.S. Intuit account.
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What we do

How does Intuit protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does Intuit collect my personal information?	We collect your personal information, for example, when you ▪ open an account or seek financial or tax advice ▪ give us your contact information or give us your income information ▪ apply for a loan We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only ▪ sharing for affiliates' everyday business purposes—information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. ▪ <i>Our affiliates include companies with the Intuit name (operating as TurboTax, QuickBooks, Mint, Credit Karma, and Mailchimp)</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. ▪ <i>Our joint marketing partners are financial service companies.</i>

Other important information

For Vermont Customers:

- We will not disclose information about your creditworthiness to our affiliates and will not disclose your personal information, financial information, credit report, or health information to nonaffiliated third parties to market to you, other than as permitted by Vermont law, unless you authorize us to make those disclosures.
- Additional information concerning our privacy policies can be found at <https://www.intuit.com/privacy/>.

For California Customers: In accordance with California law, we will not share information we collect about California residents with nonaffiliates, unless the law allows. For example, we may share information with your consent, to service your accounts. We will limit sharing among our companies to the extent required by California law.

*We do not share information about your creditworthiness with affiliates for their everyday business purposes. However, we may share information about your creditworthiness with affiliates for other purposes, with your consent.

IMPORTANT DISCLOSURES

If you are owed federal or state tax refund(s), you have a right to choose how you will receive the refund(s). There are several options available to you. Some options cost money and some options are free. Please read about these options below.

You can file your federal tax return(s) electronically or by paper and obtain your federal tax refund(s) directly from the Internal Revenue Service ("IRS") for free. Additionally, you can file your state tax return(s) electronically or by paper and obtain your state tax refund(s) directly from the applicable state taxing authority for free. If you file your federal tax return(s) electronically, you can receive refund checks directly from the IRS through the U.S. Postal Service in 21 to 28 days from the time you file your tax return(s) or the IRS can disburse your refund(s) directly into your bank account in less than 21 days from the time you file your tax return(s) unless there are delays by the IRS. If you file a paper federal tax return(s) through the U.S. Postal Service, you can receive refund checks directly from the IRS through the U.S. Postal Service in 6 to 8 weeks from the time the IRS receives your return(s) or the IRS can disburse your refund(s) directly into your bank account in 6 to 8 weeks from the time the IRS receives your return(s). However, if your federal tax return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2026. Please consult your applicable state taxing authority's website for details on when you can expect to receive your state tax refund(s).

The following paragraph applies to the ERPS only: You can file your federal and/or state tax return(s) electronically, select the Early Refund Processing Service (the "ERPS") for an additional fee of \$35.00 (the "ERPS Fee"), and have your federal and/or state tax refund(s) processed with Intuit Payments, Inc. ("IPI", "we", "our", or "us"). Your refund will be processed through an account created for you at a partner financial institution, such as Cross River Bank ("Bank"). The ERPS allows us to track your federal and/or state refund and provide the refund amount to you up to 5 days earlier than the communicated tax authority settlement date. This is accomplished when you elect to have your federal and/or state refund(s) disbursed into an account at Bank and we receive notice of the federal and/or state refund settlement date and can send the refund amount, minus any authorized fees for the service, to the bank account indicated on your tax return. If you file your tax return(s) electronically and select the ERPS, the IRS and/or applicable state taxing authority will deposit your refund(s) with Bank. Unless there are unexpected delays, federal refunds are received in less than 21 days from the time you file your tax return(s) electronically. However, if your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2026. Your selection of the ERPS means, if eligible, you will receive your federal and/or state refund proceeds up to five (5) days early.

The following paragraph applies to the RPS only: You can file your federal and state tax return(s) electronically, select the Refund Processing Service (the "RPS") for an additional fee of \$40.00 (the "Refund Processing Fee"), and have your federal and/or state tax refund(s) processed with IPI. The RPS allows your refund(s) to be deposited into an account created for you at a partner financial institution, such as Bank, and deducts your TurboTax fees and other amounts that you authorize from your federal and/or state refund(s). The balance of your federal refund will still be delivered to you using the ERPS, if you use the ERPS in addition to the RPS. If you file your tax return(s) electronically and select the RPS, the IRS and/or the applicable state taxing authority will deposit your refund(s) into your account at Bank. If applicable, IPI will deduct from your federal and/or state refund(s) the Refund Processing Fee, any fees charged by TurboTax for the preparation and filing of your tax return(s) and any other amounts authorized by you. IPI will disburse any remaining balance of your state tax refund proceeds to you up to 5 days early, assuming you elect to use the ERPS and have already received your federal tax refund. Please consult your applicable state taxing authority's website for details on when you can expect to receive your state tax refund(s).

The ERPS and the RPS are not necessary to obtain your refund(s). If you have an existing bank account and do not desire to receive the ERPS or the RPS, you do not need to use the ERPS or the RPS in order to receive a direct disbursement from the IRS or applicable state taxing authority. You may consult the IRS website ([irs.gov](https://www.irs.gov)) or website of the applicable state taxing authority for information about tax refund processing.



If you select the ERPS or the RPS, no prior debt you may owe to Bank will be deducted from your refund(s).

You can change your income tax withholdings which might result in you retaining more of your compensation throughout the year rather than waiting to receive withheld amounts potentially in tax refund(s) next year. Please consult your employer or tax advisors for additional details.

This Agreement requires all disputes to be resolved by way of binding arbitration. The terms of the arbitration provision appear in Section 11.

Information regarding low-cost deposit accounts may be available at www.mymoney.gov.

The chart below shows the options for filing your federal and state tax returns (e-file or paper returns), the ERPS product, the RPS product, refund disbursement options, estimated timing for obtaining your federal tax refund proceeds, and costs associated with the various options.

WHAT TYPE OF FILING METHOD?	WHAT ARE YOUR DISBURSEMENT OPTIONS?	WHAT IS THE ESTIMATED TIME TO RECEIVE REFUND(S)?	WHAT COSTS DO YOU INCUR IN ADDITION TO TAX PREPARATION FEES?
PAPER RETURN No Early Refund Processing Service or Refund Processing Service	IRS or applicable state taxing authority issues direct disbursement to your bank account.	Approximately 6 to 8 weeks ¹ Check website for applicable state taxing authority	No additional cost.
	Check mailed by IRS or applicable state taxing authority to address on tax return(s).	Approximately 6 to 8 weeks ¹ Check website for applicable state taxing authority	
ELECTRONIC FILING (E-FILE) No Early Refund Processing Service or Refund Processing Service	IRS or applicable state taxing authority issues direct disbursement to your bank account.	Usually within 21 days ¹ Check website for applicable state taxing authority	No additional cost.
	Check mailed by IRS or applicable state taxing authority to address on tax return(s).	Approximately 21 to 28 days ¹ Check website for applicable state taxing authority	
ELECTRONIC FILING (E-FILE) Early Refund Processing Service	Direct disbursement to your bank account.	Usually within 21 days ¹ Check website for applicable state taxing authority	\$ <u>35.00</u> for ERPS ²

ELECTRONIC FILING (E-FILE) Refund Processing Service	Direct disbursement to your bank account.	Usually within 21 days Check website for applicable state taxing authority	\$ <u>40.00</u> for RPS ³
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¹You may experience delays with your tax refund(s) if, for example, you enter incorrect bank account or contact information, you enter a bank account in someone else's name, or if possible suspicious activity is detected. If your return(s) contains Earned Income Tax Credit or Additional Child Tax Credit, the IRS will issue your refund(s) no earlier than February 15, 2026.

² If you select and obtain ERPS to receive your federal and/or state refund proceeds up to five (5) days early, you will be charged a \$ 35.00 fee.

³ The charges here consist of a Refund Processing Fee, and any fees for additional products and services purchased. See the Refund Processing Agreement for the cost of the service you have chosen.

Questions? Call 1-800-446-8848



For the year Jan. 1–Dec. 31, 2025, or other tax year beginning , 2025, ending , 20 See separate instructions.

☐ Filed pursuant to section 301.9100-2 ☐ Combat zone ☐ Deceased ☐ Spouse
☐ Other

Your first name and middle initial Lauren J	Last name Donahoo	Your social security number
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Check here if your main home, and your spouse's if filing a joint return, was in the U.S. for more than half of 2025. ☒

City, town, or post office. If you have a foreign address, also complete spaces below. Milton	State FL	ZIP code 325708592	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
Foreign country name	Foreign province/state/county	Foreign postal code	

Filing Status ☒ Single ☐ Head of household (HOH)
Check only one box. ☐ Married filing jointly (even if only one had income) ☐ Qualifying surviving spouse (QSS)
☐ Married filing separately (MFS). Enter spouse's SSN above and full name here: If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:
☐ If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required):

Digital Assets At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

Dependents	Dependent 1	Dependent 2	Dependent 3	Dependent 4
(1) First name				
(2) Last name				
(3) SSN				
(4) Relationship	Daughter			
(5) Check if lived with you more than half of 2025	(a) ☒ Yes (b) ☒ And in the U.S.	(a) ☐ Yes (b) ☐ And in the U.S.	(a) ☐ Yes (b) ☐ And in the U.S.	(a) ☐ Yes (b) ☐ And in the U.S.
(6) Check if	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled	☐ Full-time student ☐ Permanently and totally disabled
(7) Credits	☐ Child tax credit ☒ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents	☐ Child tax credit ☐ Credit for other dependents

☐ Check if your filing status is MFS or HOH and you lived apart from your spouse for the last 6 months of 2025, or you are legally separated according to your state law under a written separation agreement or a decree of separate maintenance and you did not live in the same household as your spouse at the end of 2025.

Income Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.	1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	44,622.
	b	Household employee wages not reported on Form(s) W-2	1b	
	c	Tip income not reported on line 1a (see instructions)	1c	
	d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
	e	Taxable dependent care benefits from Form 2441, line 26	1e	
	f	Employer-provided adoption benefits from Form 8839, line 31	1f	
	g	Wages from Form 8919, line 6	1g	
	h	Other earned income (see instructions). Enter type and amount:	1h	0.
	i	Nontaxable combat pay election (see instructions)	1i	
	z	Add lines 1a through 1h	1z	44,622.
Attach Sch. B if required.	2a	Tax-exempt interest	2a	
	3a	Qualified dividends	3a	
	c	Check if your child's dividends are included in 1 ☐ Line 3a	2 ☐ Line 3b	
	4a	IRA distributions	4a	
	c	Check if (see instructions) 1 ☐ Rollover	2 ☐ QCD 3 ☐	
	5a	Pensions and annuities	5a	
	c	Check if (see instructions) 1 ☐ Rollover	2 ☐ PSO 3 ☐	
	6a	Social security benefits	6a	
	c	If you elect to use the lump-sum election method, check here (see instructions)		
	d	If you are married filing separately and lived apart from your spouse the entire year (see inst.), check here		
	7a	Capital gain or (loss). Attach Schedule D if required	7a	
	b	Check if: ☐ Schedule D not required ☐ Includes child's capital gain or (loss)		
	8	Additional income from Schedule 1, line 10	8	
	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7a, and 8. This is your total income	9	44,622.
	10	Adjustments to income from Schedule 1, line 26	10	
	11a	Subtract line 10 from line 9. This is your adjusted gross income	11a	44,622.

Tax and Credits	11b	Amount from line 11a (adjusted gross income)	11b	44,622.
	12a	Someone can claim ☐ You as a dependent ☐ Your spouse as a dependent		
	b	☐ Spouse itemizes on a separate return c ☐ You were a dual-status alien		
	d	You: ☐ Were born before January 2, 1961 ☐ Are blind		
		Spouse: ☐ Was born before January 2, 1961 ☐ Is blind		
	e	Standard deduction or itemized deductions (from Schedule A)	12e	15,750.
	13a	Qualified business income deduction from Form 8995 or Form 8995-A	13a	
	b	Additional deductions from Schedule 1-A, line 38	13b	
	14	Add lines 12e, 13a, and 13b	14	15,750.
	15	Subtract line 14 from line 11b. If zero or less, enter -0-. This is your taxable income	15	28,872.
Standard deduction for— • Single or Married filing separately, \$15,750 • Married filing jointly or Qualifying surviving spouse, \$31,500 • Head of household, \$23,625 • If you checked a box on line 12a, 12b, 12c, or 12d, see inst.	16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	16	3,227.
	17	Amount from Schedule 2, line 3	17	
	18	Add lines 16 and 17	18	3,227.
	19	Child tax credit or credit for other dependents from Schedule 8812	19	500.
	20	Amount from Schedule 3, line 8	20	
	21	Add lines 19 and 20	21	500.
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	2,727.
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	0.
	24	Add lines 22 and 23. This is your total tax	24	2,727.
	Payments and Refundable Credits	25	Federal income tax withheld from:	
a		Form(s) W-2	25a	3,085.
b		Form(s) 1099	25b	
c		Other forms (see instructions)	25c	
d		Add lines 25a through 25c	25d	3,085.
26		2025 estimated tax payments and amount applied from 2024 return	26	
		If you made estimated tax payments with your former spouse in 2025, enter their SSN (see instructions):		
27a		Earned income credit (EIC)	27a	928.
b		Clergy filing Schedule SE (see instructions)		☐
c		If you do not want to claim the EIC, check here		☐
Refund	28	Additional child tax credit (ACTC) from Schedule 8812. If you do not want to claim the ACTC, check here ☐	28	
	29	American opportunity credit from Form 8863, line 8	29	
	30	Refundable adoption credit from Form 8839, line 13	30	
	31	Amount from Schedule 3, line 15	31	
	32	Add lines 27a, 28, 29, 30, and 31. These are your total other payments and refundable credits	32	928.
	33	Add lines 25d, 26, and 32. These are your total payments	33	4,013.
	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	1,286.
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐	35a	1,286.
		☒ Checking ☐ Savings		
	36	Amount of line 34 you want applied to your 2026 estimated tax	36	
Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions.	37	
	38	Estimated tax penalty (see instructions)	38	
Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions. ☐ Yes. Complete below. ☒ No			
	Designee's name	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 Licensed Practical Nurse	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Joint return? See instructions. Keep a copy for your records.	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. (850) -	Email address		
Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN
	Firm's name Self-Prepared	Firm's address		Phone no. Firm's EIN

**SCHEDULE EIC
(Form 1040)**Department of the Treasury
Internal Revenue Service**Earned Income Credit**

Qualifying Child Information

Complete and attach to Form 1040 or 1040-SR only if you have a qualifying child.
Go to www.irs.gov/ScheduleEIC for the latest information.

OMB No. 1545-0074

2025
Attachment
Sequence No. **43**

Name(s) shown on return

Lauren J Donahoo

Before you begin:

- See the instructions for Form 1040, line 27a, to make sure that (a) you can take the EIC, and (b) you have a qualifying child. See also Pub. 596.
- Be sure the child's name on line 1 and social security number (SSN) on line 2 agree with the child's social security card. Otherwise, at the time we process your return, we may reduce your EIC. If the name or SSN on the child's social security card is not correct, call the Social Security Administration at 800-772-1213.
- If you have a child who meets the conditions to be your qualifying child for purposes of claiming the EIC, but that child doesn't have an SSN as defined in the instructions for Form 1040, line 27a, see the instructions.



- You can't claim the EIC for a child who didn't live with you for more than half of the year.
- If your child doesn't have an SSN as defined in the instructions for Form 1040, line 27a, see the instructions.
- If you take the EIC even though you are not eligible, you may not be allowed to take the credit for up to 10 years. See the instructions for details.
- It will take us longer to process your return and issue your refund if you do not fill in all lines that apply for each qualifying child.

Qualifying Child Information**Child 1****Child 2****Child 3**

	First name	Last name	First name	Last name	First name	Last name
1 Child's name If you have more than three qualifying children, you have to list only three to get the maximum credit.						
2 Child's SSN The child must have an SSN as defined in the instructions for Form 1040, line 27a, unless the child was born and died in 2025 or you are claiming the self-only EIC (see instructions). If your child was born and died in 2025 and did not have an SSN, enter "Died" on this line and attach a copy of the child's birth certificate, death certificate, or hospital medical records showing a live birth.						
3 Child's year of birth	Year <u>2</u> <u>0</u> <u>0</u> <u>7</u> <i>If born after 2006 and the child is younger than you (or your spouse if filing jointly), skip lines 4a and 4b; go to line 5.</i>	Year _____ <i>If born after 2006 and the child is younger than you (or your spouse if filing jointly), skip lines 4a and 4b; go to line 5.</i>	Year _____ <i>If born after 2006 and the child is younger than you (or your spouse if filing jointly), skip lines 4a and 4b; go to line 5.</i>	Year _____ <i>If born after 2006 and the child is younger than you (or your spouse if filing jointly), skip lines 4a and 4b; go to line 5.</i>	Year _____ <i>If born after 2006 and the child is younger than you (or your spouse if filing jointly), skip lines 4a and 4b; go to line 5.</i>	Year _____ <i>If born after 2006 and the child is younger than you (or your spouse if filing jointly), skip lines 4a and 4b; go to line 5.</i>
4a Was the child under age 24 at the end of 2025, a student, and younger than you (or your spouse if filing jointly)?	☐ Yes. <i>Go to line 5.</i>	☐ No. <i>Go to line 4b.</i>	☐ Yes. <i>Go to line 5.</i>	☐ No. <i>Go to line 4b.</i>	☐ Yes. <i>Go to line 5.</i>	☐ No. <i>Go to line 4b.</i>
b Was the child permanently and totally disabled during any part of 2025?	☐ Yes. <i>Go to line 5.</i>	☐ No. The child is not a qualifying child.	☐ Yes. <i>Go to line 5.</i>	☐ No. The child is not a qualifying child.	☐ Yes. <i>Go to line 5.</i>	☐ No. The child is not a qualifying child.
5 Child's relationship to you (for example, son, daughter, grandchild, niece, nephew, eligible foster child, etc.)	Daughter					
6 Number of months child lived with you in the United States during 2025 • If the child lived with you for more than half of 2025 but less than 7 months, enter "7." • If the child was born or died in 2025 and your home was the child's home for more than half the time they were alive during 2025, enter "12."	<u>12</u> months <i>Do not enter more than 12 months.</i>	_____ months <i>Do not enter more than 12 months.</i>	_____ months <i>Do not enter more than 12 months.</i>	_____ months <i>Do not enter more than 12 months.</i>	_____ months <i>Do not enter more than 12 months.</i>	_____ months <i>Do not enter more than 12 months.</i>

SCHEDULE 8812
(Form 1040)

Department of the Treasury
Internal Revenue Service

**Credits for Qualifying Children
and Other Dependents**

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

Go to www.irs.gov/Schedule8812 for instructions and the latest information.

OMB No. 1545-0074

2025

Attachment
Sequence No. **47**

Name(s) shown on return

Lauren J Donahoo

Part I Child Tax Credit and Credit for Other Dependents

1	Enter the amount from line 11a of your Form 1040, 1040-SR, or 1040-NR	1	44,622.
2a	Enter income from Puerto Rico that you excluded	2a	
b	Enter the amounts from lines 45 and 50 of your Form 2555	2b	0.
c	Enter the amount from line 15 of your Form 4563	2c	
d	Add lines 2a through 2c	2d	0.
3	Add lines 1 and 2d	3	44,622.
4	Number of qualifying children under age 17 with the required social security number	4	0
5	Multiply line 4 by \$2,200	5	
6	Number of other dependents, including any qualifying children who are not under age 17 or who do not have the required social security number	6	1
Caution: Do not include yourself, your spouse, or anyone who is not a U.S. citizen, U.S. national, or U.S. resident alien. Also, do not include anyone you included on line 4.			
7	Multiply line 6 by \$500	7	500.
8	Add lines 5 and 7	8	500.
9	Enter the amount shown below for your filing status. • Married filing jointly—\$400,000 • All other filing statuses—\$200,000	9	200,000.
10	Subtract line 9 from line 3. • If zero or less, enter -0-. • If more than zero and not a multiple of \$1,000, enter the next multiple of \$1,000. For example, if the result is \$425, enter \$1,000; if the result is \$1,025, enter \$2,000, etc.	10	0.
11	Multiply line 10 by 5% (0.05)	11	0.
12	Is the amount on line 8 more than the amount on line 11? ☐ No. Stop here. You cannot take the child tax credit, credit for other dependents, or additional child tax credit. ☒ Yes. Subtract line 11 from line 8. Enter the result.	12	500.
13	Enter the amount from Credit Limit Worksheet A	13	3,227.
14	Enter the smaller of line 12 or line 13. This is your child tax credit and credit for other dependents Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 19.	14	500.

If the amount on line 12 is more than the amount on line 14, you may be able to take the **additional child tax credit** on Form 1040, 1040-SR, or 1040-NR, line 28. Complete your Form 1040 or Form 1040-SR through line 27a (or Form 1040-NR through line 26) (also complete Schedule 3 (Form 1040), line 11) before completing Part II-A.

Part II-A Additional Child Tax Credit for All Filers**Caution:** If you file Form 2555, you cannot claim the additional child tax credit.

15	Reserved for future use	15	
16a	Subtract line 14 from line 12. If zero, stop here ; you cannot take the additional child tax credit	16a	0.
b	Number of qualifying children under age 17 with the required social security number: _____ x \$1,700. Enter the result. If zero, stop here ; you cannot claim the additional child tax credit TIP: The number of children you use for this line is the same as the number of children you used for line 4.	16b	
17	Enter the smaller of line 16a or line 16b	17	
18a	Earned income (see instructions)	18a	
b	Nontaxable combat pay (see instructions)	18b	
19	Is the amount on line 18a more than \$2,500? ☐ No. Leave line 19 blank and enter -0- on line 20. ☐ Yes. Subtract \$2,500 from the amount on line 18a. Enter the result	19	
20	Multiply the amount on line 19 by 15% (0.15) and enter the result Next. On line 16b, is the amount \$5,100 or more? ☐ No. If you are a bona fide resident of Puerto Rico, go to line 21. Otherwise, skip Part II-B and enter the smaller of line 17 or line 20 on line 27. ☐ Yes. If line 20 is equal to or more than line 17, skip Part II-B and enter the amount from line 17 on line 27. Otherwise, go to line 21.	20	

Part II-B Certain Filers Who Have Three or More Qualifying Children and Bona Fide Residents of Puerto Rico

21	Withheld social security, Medicare, and Additional Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If your employer withheld or you paid Additional Medicare Tax or tier 1 RRTA taxes, or if you are a bona fide resident of Puerto Rico, see instructions	21	
22	Enter the total of the amounts from Schedule 1 (Form 1040), line 15; Schedule 2 (Form 1040), line 5; Schedule 2 (Form 1040), line 6; and Schedule 2 (Form 1040), line 13	22	
23	Add lines 21 and 22	23	
24	1040 and 1040-SR filers: Enter the total of the amounts from Form 1040 or 1040-SR, line 27a, and Schedule 3 (Form 1040), line 11. 1040-NR filers: Enter the amount from Schedule 3 (Form 1040), line 11.	24	
25	Subtract line 24 from line 23. If zero or less, enter -0-	25	
26	Enter the larger of line 20 or line 25 Next, enter the smaller of line 17 or line 26 on line 27.	26	

Part II-C Additional Child Tax Credit

27	This is your additional child tax credit. Enter this amount on Form 1040, 1040-SR, or 1040-NR, line 28	27	
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