

2025 Form 6 - Full and Public Disclosure of Financial Interests

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DEPARTMENT OF STATE

2026 JUN -9 AM 11:27

General Information

DIVISION OF ELECTIONS
TALLAHASSEE, FL

Name: Mr Erik Morris

Organization

Suborganization

Title

N/A

CANDIDATE FOR

Position

Agency Name

Position sought or held

Governor

State of Florida

Governor

Net Worth

My Net Worth as of December 31, 2025 was \$ 510,528.57.

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 \$ 8,500.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

2025 Form 6 - Full and Public Disclosure of Financial Interests

Description of Asset	Value of Asset
4219 Briarberry Ln	\$ 446,000.00
Cash	\$ 1,259.00
Savings Bank of America 12-31-25	\$ 26,905.00
Vanguard Target 2050 12-31-25	\$ 101,629.94
AMZN 12/28/25	\$ 1,132.50
CCL 12/28/25	\$ 1,205.88
CMCSA 12/29/25	\$ 27,927.33
COIN 12/29/25	\$ 2,199.73
CPNG 12/31/25	\$ 1,415.40
DAL 12/29/25	\$ 1,381.20
DIDIY 12/29/25	\$ 1,545.68
GOOGL 12/29/25	\$ 1,890.90
NCLH 12/29/25	\$ 1,116.22
RBLX 12/29/25	\$ 5,585.55
VSNT 12/29/25	\$ 1,819.35
STM 12/31/25	\$ 2,334.60
IONQ 12/31/25	\$ 3,140.90
META 12/31/25	\$ 6,600.90
DIS 12/31/25	\$ 24,115.83
EA 12/31/25	\$ 53,125.80
CTYCX 12/31/25	\$ 1,646.81
VCEL 12/31/25	\$ 5,869.63
DRI 12/31/25	\$ 4,600.50
1904 S. 9th Street Haines City	\$ 205,000.00
Toyota Prius	\$ 17,500.00

2025 Form 6 - Full and Public Disclosure of Financial Interests

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Rocket Mortgage	1050 Woodward Ave. Detroit, MI 48226	\$ 99,126.23
PennyMac Loan Services Mortgage	POB 514387, Los Angeles, CA 90051-4387	\$ 334,096.28
Driveway Finance Corporation Car Loan	POB 23605, Portland, OR 97281-3605	\$ 7,419.02
Service Finance Company	555 South Federal Highway, Ste 200, Boca Raton, FL 33432	\$ 5,268.55

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

Income

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

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

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

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.

Erik Morris

Digitally signed: 06/05/2026

For Qualifying
purposes Only



2025 Federal Tax Return Filing
Instructions
FOR THE YEAR ENDING
December 31, 2025

Prepared for	ERIK E MORRIS DANDAN SUI																										
Tax Summary	<table style="width: 100%;"><tr><td style="width: 60%;">Gross Income.....</td><td style="width: 20%;"></td><td style="width: 20%; text-align: right;">\$140820</td></tr><tr><td>Adjusted Gross Income.....</td><td></td><td style="text-align: right;">\$140520</td></tr><tr><td>Total Deductions.....</td><td></td><td style="text-align: right;">\$38172</td></tr><tr><td>Total Taxable Income.....</td><td></td><td style="text-align: right;">\$102348</td></tr><tr><td>Total Tax.....</td><td></td><td style="text-align: right;">\$11928</td></tr><tr><td>Total Payments.....</td><td></td><td style="text-align: right;">\$16115</td></tr><tr><td>Refund Amount.....</td><td></td><td style="text-align: right;">\$4187</td></tr><tr><td>Amount You Owe.....</td><td></td><td style="text-align: right;">\$0</td></tr></table>			Gross Income.....		\$140820	Adjusted Gross Income.....		\$140520	Total Deductions.....		\$38172	Total Taxable Income.....		\$102348	Total Tax.....		\$11928	Total Payments.....		\$16115	Refund Amount.....		\$4187	Amount You Owe.....		\$0
Gross Income.....		\$140820																									
Adjusted Gross Income.....		\$140520																									
Total Deductions.....		\$38172																									
Total Taxable Income.....		\$102348																									
Total Tax.....		\$11928																									
Total Payments.....		\$16115																									
Refund Amount.....		\$4187																									
Amount You Owe.....		\$0																									
Make check payable to																											
Mailing Address	Since you are filing your return electronically and you chose to use an electronic signature, you do not mail your return.																										

Instructions

If you e-filed your return and it has been accepted, you will get notified via text or email if you opted for that option.

Your tax obligation is exactly met. No additional tax is due.



**2025 STATE TAX RETURN FILING
INSTRUCTIONS
NORTH CAROLINA
FOR THE YEAR ENDING
December 31, 2025**

Prepared for																						
Tax Summary	<table><tr><td>Adjusted Gross Income.....</td><td>\$</td><td>140,520</td></tr><tr><td>Total Deductions.....</td><td>\$</td><td>25,500</td></tr><tr><td>Total Taxable Income.....</td><td>\$</td><td>26,512</td></tr><tr><td>Total Tax.....</td><td>\$</td><td>1,127</td></tr><tr><td>Total Payments.....</td><td>\$</td><td>1,265</td></tr><tr><td>Refund Amount.....</td><td>\$</td><td>138</td></tr><tr><td>Amount You Owe.....</td><td>\$</td><td>0</td></tr></table>	Adjusted Gross Income.....	\$	140,520	Total Deductions.....	\$	25,500	Total Taxable Income.....	\$	26,512	Total Tax.....	\$	1,127	Total Payments.....	\$	1,265	Refund Amount.....	\$	138	Amount You Owe.....	\$	0
Adjusted Gross Income.....	\$	140,520																				
Total Deductions.....	\$	25,500																				
Total Taxable Income.....	\$	26,512																				
Total Tax.....	\$	1,127																				
Total Payments.....	\$	1,265																				
Refund Amount.....	\$	138																				
Amount You Owe.....	\$	0																				
Make check payable to																						
Mailing Address	Since you are filing your return electronically and you chose to use an electronic signature, you do not mail your return.																					

Special Instructions

Keep A Copy

Click on Main Menu and then E-File or Print to print your return. Attach your copy of each W-2, W-2G, 1099R or 1099G with withholding. Keep with your records for three years.

2026 INCOME TAX ESTIMATOR/PLANNER

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

Current
2025

Adjustments
2026

Estimated
2026

Filing status

MFJ

MFJ

INCOME:

Wages, salaries, tips, etc.	134,225		134,225
Interest income	671		671
Ordinary dividend income (excluding Qualified Dividends)	6		6
IRA distributions and pension income			
Taxable social security income			
Capital gain or (loss) (Schedule D) (including Qual Dividends)	1,170		1,170
Schedule 1 Income			
Refunds of state and local taxes			
Alimony received from divorces finalized before 1/1/2025			
Business income or (loss) (Schedule C)			
Other gains or (losses) (Form 4797)			
Rental real estate, partnerships, estates, etc. (Schedule E)	4,460		4,460
Farm income or (loss) (Schedule F)			
Unemployment compensation			
Other income	288		288
Total income	140,820		140,820

ADDITIONAL DEDUCTIONS:

Qualified tips deduction			
Qualified overtime compensation deduction			
Qualified vehicle loan interest deduction			
Senior deduction			

ADJUSTMENTS:

Schedule 1 Adjustments

Educator expenses	300		300
Certain business expenses of reservists, performing artist, and fee-basis government officials			
Health savings account deduction (Form 8889)			
Qualified moving expenses			
Deductible part of self-employment tax (Schedule SE)			
Self-employed SEP, SIMPLE and qualified plans deduction ..			
Self-employed health insurance			
Penalty on early withdrawal of savings			
Alimony paid on divorces finalized before 1/1/2025			
IRA deduction			
Student loan interest deduction			
Archer MSA deduction			
Other adjustments			
Total adjustments	300		300

ADJUSTED GROSS INCOME:

140,520 140,520

DEDUCTIONS:

Standard deduction	31,500	700	32,200
Itemized deductions:			
Medical and dental expenses			
Sales, income, and other taxes paid	21,839		21,839
Interest paid	15,157		15,157
Gifts to charity	1,151		1,151
Casualty and theft losses			
Other miscellaneous deductions	25		25
Total itemized deductions	38,172		38,172
Deduction actually claimed	38,172		38,172
Qualified business income deduction			

2026 INCOME TAX ESTIMATOR/PLANNER

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

	Current 2025	Adjustments 2026	Estimated 2026
TAX COMPUTATION (BEFORE CREDITS):			
Taxable income	102,348		102,348
Tax	12,240	-299	11,941
Schedule 2 - Taxes			
Additions to Tax			
Alternative minimum tax			
Tax rate	22.00%		22.00%
CREDITS:			
Child and other dependents tax credit			
Schedule 3 - Nonrefundable Credits			
Foreign tax credit	1		1
Child care credit			
Education credit			
Retirement savings contribution credit			
Other credits	329		329
Total credits	330		330
OTHER TAXES:			
Schedule 2 - Other Taxes			
Self-employment tax			
Additional tax on IRAs	18		18
Other taxes			
Total other taxes	18		18
PAYMENTS:			
Federal income tax withheld	16,115		16,115
Estimated payments			
Earned income credit			
Additional child tax credit			
Schedule 3 - Refundable Credits and Payments			
American opportunity credit			
ACA premium tax credit			
Other payments			
Total payments	16,115		16,115
AMOUNT DUE / REFUND:			
Amount overpaid	4,187	299	4,486
Overpayment applied to next year			
Refund	4,187	299	4,486
Amount due			

Note: These amounts and calculations are for estimating purposes only and should not be assumed to be your final refund or liability for 2025 taxes. State implications have not been considered in these calculations. Be sure to schedule a tax appointment to have your 2025 tax return prepared using the actual 2025 tax forms issued by the Internal Revenue Service and your actual 2025 source documents.

ADDITIONAL DISCLOSURES:

Subject to an adjusted withholding entry, the 2025 withholding is being used to calculate the 2026 estimated tax refund or balance Due.

Beginning in January 2020 the IRS has changed the way W4 should be prepared reporting extra income, deductions and credits rather than exemption counts. These changes might cause some change in withholding. Advise client that employers may require a new W4 be filed under the new format.

The mortgage interest deduction for any qualified residence acquired after December 15, 2017 is limited to interest on the first \$750,000 (\$375,000 for MFS) of the mortgage. Loans financed before that date are (See attached)

2026 INCOME TAX ESTIMATOR/PLANNER

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

ADDITIONAL DISCLOSURES:

still subject to the \$1,000,000 (\$500,000) limit from prior law. For tax years after 2022 home equity debt will no longer be deductible as qualified residence interest.

Standard deduction limits increased to \$32,200 for MFJ and QSS filers \$24,150 for head of household (HOH) filers \$16,100 single

The State and local tax deduction is limited to \$10,000 (\$5,000 MFS)

2025 TWO YEAR COMPARISON

ERIK E MORRIS & DANDAN SUI

	2025	2024	Keep for Your Records Difference
Filing status	MFJ	MFS	
INCOME:			
Wages, salaries, tips, etc.	134,225	95,429	38,796
Interest income	671	195	476
Ordinary dividend income	1,498	1,407	91
IRA distributions and pension income			
Taxable social security income			
Capital gain or (loss) (Schedule D)	-322	-16	-306
Schedule 1 - Income			
Refunds of state and local taxes			
Alimony received			
Business income or (loss) (Schedule C)			
Other gains or (losses) (Form 4797)			
Rental real estate, partnerships, estates, etc. (Schedule E)	4,460	128	4,332
Farm income or (loss) (Schedule F)			
Unemployment compensation			
Other income	288		288
Total Income	140,820	97,143	43,677
ADJUSTMENTS:			
Schedule 1 - Adjustments			
Educator expenses	300		300
Busn expenses for reservists, performing artists, etc			
Health savings account deduction			
Moving expenses			
Deductible part of self-employment tax			
Self-employed SEP, SIMPLE and qualified plans deduction			
Self-employed health insurance			
Penalty on early withdrawal of savings			
Alimony paid			
IRA contributions			
Student loan interest deduction			
Archer MSA deduction			
Other adjustments			
Total adjustments	300		300
ADJUSTED GROSS INCOME:	140,520	97,143	43,377
DEDUCTIONS:			
Standard deduction or Itemized deductions	38,172	19,790	18,382
Charitable contributions if taking standard deduction	N/A		
If itemized, Schedule A deductions:			
Medical and dental expenses			
Sales, income, and other taxes paid	21,839	5,000	16,839
Interest paid	15,157	14,047	1,110
Gifts to charity	1,151	743	408
Casualty and theft losses			
Other miscellaneous deductions	25		25
Qualified business income deduction			
Schedule 1-A Additional deductions			
Qualified tips deduction			
Qualified overtime compensation deduction			
Qualified passenger vehicle loan interest deduction			
Enhanced deduction for seniors			
TAXABLE INCOME:	102,348	77,353	24,995

2025 TWO YEAR COMPARISON

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

	2025	2024	Difference
TAX COMPUTATION (BEFORE CREDITS):			
Tax	12,240	11,978	262
Tax calculation method	QDCGTW	QDCGTW	
Schedule 2 - Taxes			
Additions to Tax			
Alternative minimum tax			
Total taxes	12,240	11,978	262
Tax rate	22%	22%	
CREDITS:			
Child and other dependents tax credit		2,000	-2,000
Schedule 3 - Non-Refundable Credits			
Foreign tax credit	1	1	
Child care credit		600	-600
Education credit			
Retirement savings contribution credit			
Other credits	329	360	-31
Total credits	330	2,961	-2,631
OTHER TAXES:			
Schedule 2 - Other Taxes			
Self-employment tax			
Additional tax on IRAs	18		18
Other taxes			
TOTAL TAXES:	11,928	9,017	2,911
PAYMENTS:			
Federal income tax withheld	16,115	9,536	6,579
Estimated payments made			
Earned income credit			
Refundable child tax credit or additional child tax credit			
American opportunity credit			
Schedule 3 - Refundable Credits & Payments			
ACA premium tax credit			
Qualified sick and family leave credit			
Other payments			
Total payments	16,115	9,536	6,579
AMOUNT DUE / REFUND:			
Amount overpaid	4,187	519	3,668
Overpayment applied to next year			
Refund	4,187	519	3,668
Amount due			
Penalty			

Tax Calculation Methods:

Sch D = Sch D tax worksheet
Sch J = Inc Aver for Farmer/Fisherman
FEITW = Foreign Earned Income Tax WS

QDCGTW = Qual Div Cap Gain Tax WS
F8615 = Child with unearned income

TCW = Tax Comp Worksheet (rates)
TABLE = Tax Table

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
ERIK E

Last name
MORRIS

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

Last name
SUI

Home address (number and street). If you have a P.O. box, see instructions.
4219 Briarberry Ln

Apt. no.

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

State
FL

ZIP code
33624

Foreign country name

Foreign province/state/county

Foreign postal code

☐ You ☐ Spouse

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. ☒

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.

Filing Status

☐ Single
☒ Married filing jointly (even if only one had income)
☐ Married filing separately (MFS). Enter spouse's SSN above and full name here: _____
☐ 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): _____

☐ Head of household (HOH)
☐ Qualifying surviving spouse (QSS)
If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____

Digital Assets

At any time during 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 (see instr.):	Dependent 1	Dependent 2	Dependent 3	Dependent 4
(1) First name				
(2) Last name				
(3) SSN				
(4) Relationship				
(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	1a	1b	1c	1d	1e	1f	1g	1h	1i	1j	1k	1l	1m	1n	1o	1p	1q	1r	1s	1t	1u	1v	1w	1x	1y	1z
1a Total amount from Form(s) W-2, box 1 (see instructions).																										
1b Household employee wages not reported on Form(s) W-2																										
1c Tip income not reported on line 1a (see instructions)																										
1d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)																										
1e Taxable dependent care benefits from Form 2441, line 26																										
1f Employer-provided adoption benefits from Form 8839, line 31																										
1g Wages from Form 8919, line 6																										
1h Other earned income (see instructions). Enter type and amount:																										
1i Nontaxable combat pay election (see instructions)																										
1j Add lines 1a through 1h																										
2a Tax-exempt interest																										
2b Taxable interest																										
3a Qualified dividends																										
3b Ordinary dividends																										
4a IRA distributions																										
4b Taxable amount																										
5a Pensions and annuities																										
5b Taxable amount																										
6a Social security benefits																										
6b Taxable amount																										
7a Capital gain or (loss). Attach Schedule D if required																										
7b Check if: ☐ Schedule D not required ☐ Includes child's capital gain or (loss)																										
8 Additional income from Schedule 1, line 10																										
9 Add lines 12, 2b, 3b, 4b, 5b, 6b, 7a, and 8. This is your total income																										
10 Adjustments to income from Schedule 1, line 26																										
11a Subtract line 10 from line 9. This is your adjusted gross income																										

Tax and Credits	11b Amount from line 11a (adjusted gross income)	11b	140,520
	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	38,172
Standard deduction for-	13a Qualified business income deduction from Form 8995 or Form 8995-A	13a	
• Single or Married filing separately, \$15,750	b Additional deductions from Schedule 1-A, line 38	13b	
• Married filing jointly or Qualifying surviving spouse, \$31,600	14 Add lines 12e, 13a, and 13b	14	38,172
• Head of household, \$23,625	15 Subtract line 14 from line 11b. If zero or less, enter -0-. This is your taxable income	15	102,348
• 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	12,240
	17 Amount from Schedule 2, line 3	17	
	18 Add lines 16 and 17	18	12,240
	19 Child tax credit or credit for other dependents from Schedule 8812	19	
	20 Amount from Schedule 3, line 8	20	330
	21 Add lines 19 and 20	21	330
	22 Subtract line 21 from line 18. If zero or less, enter -0-	22	11,910
	23 Other taxes, including self-employment tax, from Schedule 2, line 21	23	18
	24 Add lines 22 and 23. This is your total tax	24	11,928
Payments and Refundable Credits	25 Federal income tax withheld from:		
	a Form(s) W-2	25a	16,115
	b Form(s) 1099	25b	
	c Other forms (see instructions)	25c	
	d Add lines 25a through 25c	25d	16,115
	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):		
If you have a qualifying child, you may need to attach Sch. EIC.	27a Earned income credit (EIC)	27a	
	b Clergy filing Schedule SE (see instructions)		
	c If you do not want to claim the EIC, check here		
	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	
	33 Add lines 25d, 26, and 32. These are your total payments	33	16,115
Refund	34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	4,187
	35a Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☒	35a	4,187
Direct deposit? See instructions.	b Routing number XXXXXXXXXXXXXXXXXXXX c Type: ☐ Checking ☐ Savings		
	d Account number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
	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	37	
	For details on how to pay, go to www.irs.gov/Payments or see instructions		
	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 occupation Project Manager		
	Spouse's occupation Retired Teacher		
Joint return? See instructions. Keep a copy for your records.	Phone no. 407	Email address	
Paid Preparer Use Only	Preparer's name	Preparer's signature	Date
	Firm's name	PTIN	Check if: ☐ Self-employed
	Firm's address	Phone no.	
		Firm's EIN	

SCHEDULE 1
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Income and Adjustments to Income

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2025

Attachment
Sequence No. **01**

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

ERIK E MORRIS & DANDAN SUI

For 2025, enter the amount reported to you on Form(s) 1099-K that was included in error or for personal

items sold at a loss

Note: The remaining amounts reported to you on Form(s) 1099-K should be reported elsewhere on your return depending on the nature of the transaction. See www.irs.gov/1099k.

Part I Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes	1	
2a	Alimony received	2a	
b	Date of original divorce or separation agreement (see instructions):		
3	Business income or (loss). Attach Schedule C	3	
4	Other gains or (losses). Check if any from Form(s): ☐ 4797 ☐ 4684	4	
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5	4,460
6	Farm income or (loss). Attach Schedule F	6	
7	Unemployment compensation. If you repaid a 2025 overpayment (see instructions), check here ☐ and enter amount repaid:	7	
8	Other income:		
a	Net operating loss	8a	()
b	Gambling	8b	288
c	Cancellation of debt	8c	
d	Foreign earned income exclusion from Form 2555	8d	()
e	Income from Form 8853	8e	
f	Income from Form 8889	8f	
g	Alaska Permanent Fund dividends	8g	
h	Jury duty pay	8h	
i	Prizes and awards	8i	
j	Activity not engaged in for profit income	8j	
k	Stock options	8k	
l	Income from the rental of personal property if you engaged in the rental for profit but were not in the business of renting such property	8l	
m	Olympic and Paralympic medals and USOC prize money (see instructions)	8m	
n	Section 951(a) inclusion (see instructions)	8n	
o	Section 951A(a) inclusion (see instructions)	8o	
p	Section 461(l) excess business loss adjustment	8p	
q	Taxable distributions from an ABLE account (see instructions)	8q	
r	Scholarship and fellowship grants not reported on Form W-2	8r	
s	Nontaxable amount of Medicaid waiver payments included on Form 1040, line 1a or 1d	8s	()
t	Pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan	8t	
u	Wages earned while incarcerated	8u	
v	Digital assets received as ordinary income not reported elsewhere. See instructions	8v	
z	Other income. List type and amount:	8z	0
9	Total other income. Add lines 8a through 8z	9	288
10	Combine lines 1 through 7 and 9. This is your additional income . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8	10	4,748

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

Schedule 1 (Form 1040) 2025 Created 7/25/25

Part II Adjustments to Income

11	Educator expenses	11	300
12	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	12	
13	Health savings account deduction. Attach Form 8889	13	
14	Moving expenses for members of the Armed Forces. Attach Form 3903. If claiming only storage fees (see instructions), check here ☐	14	
15	Deductible part of self-employment tax. Attach Schedule SE	15	
16	Self-employed SEP, SIMPLE, and qualified plans	16	
17	Self-employed health insurance deduction	17	
18	Penalty on early withdrawal of savings	18	
19a	Alimony paid	19a	
b	Recipient's SSN		
c	Date of original divorce or separation agreement (see instructions):		
20	IRA deduction. If you are married filing separately and lived apart from your spouse for the entire year (see instructions), check here ☐	20	
21	Student loan interest deduction	21	
22	Reserved for future use	22	
23	Archer MSA deduction	23	
24	Other adjustments:		
a	Jury duty pay (see instructions)	24a	
b	Deductible expenses related to income reported on line 8i from the rental of personal property engaged in for profit	24b	
c	Nontaxable amount of the value of Olympic and Paralympic medals and USOC prize money reported on line 8m	24c	
d	Reforestation amortization and expenses	24d	
e	Repayment of supplemental unemployment benefits under the Trade Act of 1974	24e	
f	Contributions to section 501(c)(18)(D) pension plans	24f	
g	Contributions by certain chaplains to section 403(b) plans	24g	
h	Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instructions)	24h	
i	Attorney fees and court costs you paid in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations	24i	
j	Housing deduction from Form 2555	24j	
k	Excess deductions of section 67(e) expenses from Schedule K-1 (Form 1041)	24k	
z	Other adjustments. List type and amount:	24z	
25	Total other adjustments. Add lines 24a through 24z	25	
26	Add lines 11 through 23 and 25. These are your adjustments to income . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 10	26	300

SCHEDULE 2
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Taxes

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2025

Attachment
Sequence No. **02**

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

ERIK E MORRIS & DANDAN SUI

Part I Tax

1	Additions to tax:			
a	Excess advance premium tax credit repayment. Attach Form 8962	1a		
b	Repayment of new clean vehicle credits(s) transferred to a registered dealer from Schedule A (Form 8936), Part II. Attach Form 8936 and Schedule A (Form 8936)	1b		
c	Repayment of previously owned clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part IV. Attach Form 8936 and Schedule A (Form 8936)	1c		
d	Recapture of net EPE from Form 4255, line 2a, column (i)	1d		
e	Excessive payments (EPs) on gross EPE from Form 4255. Check applicable box and enter amount. See instructions. (i) ☐ Line 1a (ii) ☐ Line 1c (iii) ☐ Line 1d (iv) ☐ Line 2a	1e		
f	20% EP from Form 4255. Check applicable box and enter amount. See instructions. (i) ☐ Line 1a (ii) ☐ Line 1c (iii) ☐ Line 1d (iv) ☐ Line 2a	1f		
y	Other additions to tax (see instructions):	1y		
z	Add lines 1a through 1y		1z	
2	Alternative minimum tax. Attach Form 6251		2	
3	Add lines 1z and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17		3	

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE. Check if any exemption from (see instructions): 1 ☐ 4361 2 ☐ 4029 3 ☐	4	
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5	
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6	
7	Total additional social security and Medicare tax. Add lines 5 and 6	7	
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐	8	18
9	Household employment taxes. Attach Schedule H	9	
10	Reserved for future use	10	
11	Additional Medicare Tax. Attach Form 8959	11	
12	Net investment income tax. Attach Form 8960	12	
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13	
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15	
16	Recapture of low-income housing credit. Attach Form 8611	16	

(continued on page 2)

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

Schedule 2 (Form 1040) 2025 Created 5/8/25

Part II Other Taxes (continued)**17 Other additional taxes:****a** Recapture of other credits. List type, form number, and amount:**17a****b** Recapture of federal mortgage subsidy. If you sold your home, see instructions**17b****c** Additional tax on HSA distributions. Attach Form 8889**17c****d** Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889**17d****e** Additional tax on Archer MSA distributions. Attach Form 8853**17e****f** Additional tax on Medicare Advantage MSA distributions. Attach Form 8853**17f****g** Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property**17g****h** Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A**17h****i** Compensation you received from a nonqualified deferred compensation plan described in section 457A**17i****j** Section 72(m)(5) excess benefits tax**17j****k** Golden parachute payments**17k****l** Tax on accumulation distribution of trusts**17l****m** Excise tax on insider stock compensation from an expatriated corporation**17m****n** Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866**17n****o** Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR**17o****p** Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund**17p****q** Any interest from Form 8621, line 24**17q****z** Any other taxes. List type and amount:**17z****18** Total additional taxes. Add lines 17a through 17z**18****19** Recapture of net EPE from Form 4255, line 1d, column (I)**19****20** Section 965 net tax liability installment from Form 965-A**20****21** Add lines 4, 7 through 16, 18, and 19. These are your **total other taxes**. Enter here and on Form 1040 or 1040-SR, line 23; or Form 1040-NR, line 23b**21****18**

Schedule 2 (Form 1040) 2025

SCHEDULE 3

(Form 1040)

Additional Credits and Payments

OMB No. 1545-0074

2025Attachment
Sequence No. **03**Department of the Treasury
Internal Revenue Service

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

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

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

ERIK E MORRIS & DANDAN SUI

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1	1
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441	2	
3	Education credits from Form 8863, line 19	3	
4	Retirement savings contributions credit. Attach Form 8880	4	
5a	Residential clean energy credit from Form 5695, line 15	5a	
b	Energy efficient home improvement credit from Form 5695, line 32	5b	329
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800	6a	
b	Credit for prior year minimum tax. Attach Form 8801	6b	
c	Adoption credit. Attach Form 8839	6c	
d	Credit for the elderly or disabled. Attach Schedule R	6d	
e	Reserved for future use	6e	
f	Clean vehicle credit. Attach Form 8936	6f	
g	Mortgage interest credit. Attach Form 8396	6g	
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h	
i	Qualified electric vehicle credit. Attach Form 8834	6i	
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j	
k	Credit to holders of tax credit bonds. Attach Form 8912	6k	
l	Amount on Form 8978, line 14. See instructions	6l	
m	Credit for previously owned clean vehicles. Attach Form 8936	6m	
z	Other nonrefundable credits. List type and amount:	6z	
7	Total other nonrefundable credits. Add lines 6a through 6z	7	
8	Add lines 1 through 4, 5a, 5b, and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 20	8	330

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962	9	
10	Amount paid with request for extension to file (see instructions)	10	
11	Excess social security and tier 1 RRTA tax withheld	11	
12	Credit for federal tax on fuels. Attach Form 4136	12	
13	Other payments or refundable credits:		
a	Form 2439	13a	
b	Section 1341 credit for repayment of amounts included in income from earlier years	13b	
c	Net elective payment election amount from Form 3800, Part III, line 6, column (j)	13c	
d	Deferred amount of net 965 tax liability (see instructions)	13d	
z	Other refundable credits (see instructions):	13z	
14	Total other payments or refundable credits. Add lines 13a through 13z	14	
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 31	15	

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

Schedule 3 (Form 1040) 2025 Created 11/17/25

SCHEDULE A
(Form 1040)Department of the Treasury
Internal Revenue Service**Itemized Deductions**

Attach to Form 1040 or 1040-SR.

Go to www.irs.gov/ScheduleA for instructions and the latest information.**Caution:** If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

OMB No. 1545-0074

2025Attachment
Sequence No. **07**

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

ERIK E MORRIS & DANDAN SUI

**Medical
and
Dental
Expenses****Caution:** Do not include expenses reimbursed or paid by others.

- | | | | |
|---|---|---|---------|
| 1 | Medical and dental expenses (see instructions) | 1 | |
| 2 | Enter amount from Form 1040 or 1040-SR,
line 11b | 2 | 140,520 |
| 3 | Multiply line 2 by 7.5% (0.075) | 3 | 10,539 |
| 4 | Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- | 4 | 0 |

**Taxes You
Paid**

- | | | | |
|---|--|----|--------|
| 5 | State and local taxes (SALT).
a State and local income taxes or general sales taxes. You may
include either income taxes or general sales taxes on line 5a,
but not both. If you elect to include general sales taxes instead
of income taxes, check this box ☐ | 5a | 1,265 |
| | b State and local real estate taxes (see instructions) SEE ATTACHED | 5b | 20,574 |
| | c State and local personal property taxes | 5c | |
| | d Add lines 5a through 5c | 5d | 21,839 |
| | e Enter the smaller of line 5d or \$40,000 (\$20,000 if married filing
separately). If Form 1040 or 1040-SR, line 11b is more than \$500,000
(\$250,000 if married filing separately), or if you completed Form 2555,
Form 4563, or excluded income from Puerto Rico, see instructions | 5e | 21,839 |
| 6 | Other taxes. List type and amount:
.....
..... | 6 | |
| 7 | Add lines 5e and 6 | 7 | 21,839 |

**Interest
You Paid****Caution:**
Your mortgage
interest
deduction may
be limited. See
instructions.

- | | | | |
|----|--|----|--------|
| 8 | Home mortgage interest and points. If you didn't use all of your
home mortgage loan(s) to buy, build, or improve your home,
see instructions and check this box ☐ | | |
| | a Home mortgage interest and points reported to you on Form 1098.
See instructions if limited | 8a | 15,157 |
| | b Home mortgage interest not reported to you on Form 1098. See
instructions if limited. If paid to the person from whom you bought the
home, see instructions and show that person's name, identifying no.,
and address | 8b | 0 |
| | c Points not reported to you on Form 1098. See instructions for
special rules | 8c | |
| | d Reserved for future use | 8d | |
| | e Add lines 8a through 8c | 8e | 15,157 |
| 9 | Investment interest. Attach Form 4952 if required. See instructions | 9 | |
| 10 | Add lines 8e and 9 | 10 | 15,157 |

**Gifts to
Charity****Caution:**
If you made a
gift and got a
benefit for it,
see instructions.

- | | | | |
|----|---|----|-------|
| 11 | Gifts by cash or check. If you made any gift of \$250 or more,
see instructions .. (See attached) | 11 | 226 |
| 12 | Other than by cash or check. If you made any gift of \$250 or more,
see instructions. You must attach Form 8283 if over \$500 | 12 | 925 |
| 13 | Carryover from prior year | 13 | |
| 14 | Add lines 11 through 13 | 14 | 1,151 |

**Casualty and
Theft Losses**

- | | | | |
|----|--|----|---|
| 15 | Casualty and theft loss(es) from a federally declared disaster (other than net qualified
disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions. | 15 | 0 |
|----|--|----|---|

Other**Itemized
Deductions**

- | | | | |
|----|--|----|----|
| 16 | Other—from list in instructions. List type and amount:
GAMBLING LOSSES | | 25 |
| | | 16 | 25 |

Total**Itemized****Deductions**

- | | | | |
|----|---|----|--------|
| 17 | Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on
Form 1040 or 1040-SR, line 12e | 17 | 38,172 |
| 18 | If you elect to itemize deductions even though they are less than your standard
deduction, check this box ☐ | | |

For Paperwork Reduction Act Notice, see the Instructions for Form 1040.

Schedule A (Form 1040) 2025 Created 11/20/25

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.
Go to www.irs.gov/ScheduleD for instructions and the latest information.

OMB No. 1545-0074

2025

Attachment
Sequence No. **12**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

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

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see Inst.). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.	170	221		-51
1b Totals for all transactions reported on Form(s) 8949 with Box A or Box G checked.				
2 Totals for all transactions reported on Form(s) 8949 with Box B or Box H checked.	2			2
3 Totals for all transactions reported on Form(s) 8949 with Box C or Box I checked.				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824.				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions.				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back.				7 -49

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see Inst.). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.	168	441		-273
8b Totals for all transactions reported on Form(s) 8949 with Box D or Box J checked.				
9 Totals for all transactions reported on Form(s) 8949 with Box E or Box K checked.				
10 Totals for all transactions reported on Form(s) 8949 with Box F or Box L checked.				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824.				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.				12
13 Capital gain distributions. See the instructions.				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions.				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on the back.				15 -273

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

Schedule D (Form 1040) 2025 Created 10/6/25

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	-322
● If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7a. Then, go to line 17 below. ● If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. ● If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7a. Then, go to line 22.			
17	Are lines 15 and 16 both gains? ☐ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18	If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet	18	
19	If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet	19	
20	Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7a, the smaller of: ● The loss on line 16; or ● (\$3,000), or if married filing separately, (\$1,500)	21	(322)
Note: When figuring which amount is smaller, treat both amounts as positive numbers.			
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

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

2025

Attachment
Sequence No. 12ADepartment of the Treasury
Internal Revenue ServiceGo to www.irs.gov/Form8949 for instructions and the latest information.

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

Before you check Box A, B, C, G, H, or I below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, C, G, H, or I 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 was not reported to the IRS
- ☐ (C) Short-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA
- ☐ (G) Short-term transactions reported on Form(s) 1099-DA showing basis was reported to the IRS (see **Note** above)
- ☐ (H) Short-term transactions reported on Form(s) 1099-DA showing basis was not reported to the IRS
- ☐ (I) Short-term digital asset transactions not reported to you on Form 1099-DA or Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	06 GAMESTOP COR P NEW WTS EXP 1	10-07-25	10-08-25	2	0			2
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if Box A or Box G above is checked), line 2 (if Box B or Box H above is checked), or line 3 (if Box C or Box I above is checked).....				2			0	2

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

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

Form 8949 (2025) Created 5/5/25

SCHEDULE E
(Form 1040)

Department of the Treasury
Internal Revenue Service

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

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

OMB No. 1545-0074

2025

Attachment
Sequence No. **13**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

Part I Income or Loss From Rental Real Estate and Royalties Note: If you are in the business of renting personal property, use **Schedule C**. See instructions. If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

A Did you make any payments in 2025 that would require you to file Form(s) 1099? See instructions ☐ Yes ☒ No

B If "Yes," did you or will you file required Form(s) 1099? ☐ Yes ☐ No

1a Physical address of each property (street, city, state, ZIP code)

A 1904 South 9th Street, Haines City, FL 33844

B

C

1b Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental		Personal Use		QJV	
		Days		Days			
A 1		A	365				
B		B					
C		C					

Type of Property:

1 Single Family Residence

3 Vacation/Short-Term Rental

5 Land

7 Self-Rental

2 Multi-Family Residence

4 Commercial

6 Royalties

8 Other (describe)

Income:

3 Rents received **3** 24,815

4 Royalties received **4**

Expenses:

5 Advertising **5**

6 Auto and travel (see instructions) **6** 785

7 Cleaning and maintenance **7** 1,919

8 Commissions **8**

9 Insurance **9** 2,679

10 Legal and other professional fees **10**

11 Management fees **11** 1,968

12 Mortgage interest paid to banks, etc. (see instructions) **12** 5,146

13 Other interest **13** 217

14 Repairs **14** 884

15 Supplies **15**

16 Taxes **16** 5,011

17 Utilities **17**

18 Depreciation expense or depletion **18** 1,746

19 Other (list) **19**

20 Total expenses. Add lines 5 through 19 **20** 20,355

21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file **Form 6198**. **21** 4,460

22 Deductible rental real estate loss after limitation, if any, on **Form 8582** (see instructions) **22** () () ()

23a Total of all amounts reported on line 3 for all rental properties **23a** 24,815

b Total of all amounts reported on line 4 for all royalty properties **23b**

c Total of all amounts reported on line 12 for all properties **23c** 5,146

d Total of all amounts reported on line 18 for all properties **23d** 1,746

e Total of all amounts reported on line 20 for all properties **23e** 20,355

24 Income. Add positive amounts shown on line 21. Do not include any losses. **24** 4,460

25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here **25** ()

26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, and IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2 **26** 4,460

For Paperwork Reduction Act Notice, see the separate instructions.

Schedule E (Form 1040) 2025 Created 5/6/25

Trump Account Election(s)Go to www.irs.gov/Form4547 for instructions and the latest information.

OMB No. 1545-2336

If you have a child that is eligible for a Trump account, and you want to open a Trump account for that child, complete Form 4547.

- For each child that is eligible and for whom you want to open a Trump account, complete Parts I, II, and IV.
- For each child that is eligible to receive a \$1,000 Pilot Program Contribution, check the box in Part III, line 7, in order to receive the contribution.

Part I Parent/Guardian or Other Authorized Individual Information

Note: The parent/guardian or other authorized individual listed in Part I will be the responsible party for the Trump account.

First name Erik	Middle name	Last name MORRIS		
Home address (number and street). If you have a P.O. box, see instructions. 4219 Briarberry Ln			Apartment number	
City, town, or post office. If you have a foreign address, also complete spaces below. Tampa		County Hillsborough	State FL	ZIP code 33624
Foreign country name		Foreign province/state/county	Foreign postal code	Phone no. 4077193887
				Email address

Part II Child's Information

If more than two children, see instructions.

	(i) Child 1	(ii) Child 2
1a First name		
b Middle name		
c Last name	Morris	
2 Social security number		
3 Date of birth		
4 Relationship	DAUGHTER	
5 Home Address Check here if address is same as Part I. Otherwise, complete lines 5a through 5f. If you have a foreign address, complete lines 5g, 5h, and 5i.	☒	☐
a Number and street		
b Apartment number		
c City, town, or post office		
d County		
e State		
f ZIP code		
g Foreign country name		
h Foreign province/state/county		
i Foreign postal code		
6 Check box if you are authorized to open the Trump account for the child. See instructions.	☒	☐

Part III Pilot Program Contribution Election

For a child to qualify to receive the \$1,000 Pilot Program Contribution to their Trump account, the child must have been born in 2025-2028, must be a qualifying child of the individual opening the Trump account, must be a U.S. citizen, and must have a valid social security number. See instructions.

	(i) Child 1	(ii) Child 2
7 Check box if child qualifies for, and you want the child to receive, a Pilot Program Contribution	☐	☐

Part IV Consent to Disclose Information

By completing this form, you authorize the IRS, Treasury, and their agent(s) to create and maintain a Trump account with respect to the eligible child(ren) listed on this form. You also authorize the IRS, Treasury, and their agent(s) to disclose the fact that a Trump account has been established for the eligible child(ren) listed above to any parent, guardian, or authorized individual of the eligible child who is permitted to make an election to request creation of the Trump account.

Sign Here	Under penalties of perjury, I declare that I have examined this form, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
	Your signature		Date	
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed PTIN
	Firm's name			Firm's EIN
	Firm's address			Phone no.

For Paperwork Reduction Act Notice, see separate instructions.

Form **4547** (12-2025) Created 12/30/25

Additional Taxes on Qualified Plans
(Including IRAs) and Other Tax-Favored Accounts

OMB No. 1545-0074

2025

Department of the Treasury
Internal Revenue ServiceAttach to Form 1040, 1040-SR, 1040-NR, or 1041.
Go to www.irs.gov/Form5329 for instructions and the latest information.Attachment
Sequence No. 29

Name of individual subject to additional tax. If married filing jointly, see instructions.

ERIK E MORRIS

Fill in Your Address Only
if You Are Filing This
Form by Itself and Not
With Your Tax Return

Home address (number and street), or P.O. box if mail is not delivered to your home.

Apt. no.

If this is an amended
return, check here ☐

City, town or post office, state, and ZIP code. If you have a foreign address, also complete the spaces below. See instructions.

Foreign country name

Foreign province/state/county

Foreign postal code

If you only owe the additional 10% tax on the full amount of the early distributions, you may be able to report this tax directly on
Schedule 2 (Form 1040), line 8, without filing Form 5329. See instructions.**Part I Additional Tax on Early Distributions.** Complete this part if you took a taxable distribution (other than a qualified disaster recovery distribution) before you reached age 59 1/2 from a qualified retirement plan (including an IRA) or modified endowment contract (unless you are reporting this tax directly on Schedule 2 (Form 1040)—see above). You may also have to complete this part to indicate that you qualify for an exception to the additional tax on early distributions or for certain Roth IRA distributions. See instructions.

1	Early distributions includible in income (see instructions). For Roth IRA distributions, see instructions.	1	
2	Early distributions included on line 1 that are not subject to the additional tax (see instructions). Enter the appropriate exception number from the instructions:	2	
3	Amount subject to additional tax. Subtract line 2 from line 1	3	
4	Additional tax. Enter 10% (0.10) of line 3. Include this amount on Schedule 2 (Form 1040), line 8. Caution: If any part of the amount on line 3 was a distribution from a SIMPLE IRA, you may have to include 25% of that amount on line 4 instead of 10%. See instructions.	4	

Part II Additional Tax on Certain Distributions From Education Accounts and ABL Accounts. Complete this part if you included an amount in income, on Schedule 1 (Form 1040), line 8z, from a Coverdell education savings account (ESA) or a qualified tuition program (QTP), or on Schedule 1 (Form 1040), line 8q, from an ABL account.

5	Distributions included in income from a Coverdell ESA, a QTP, or an ABL account	5	
6	Distributions included on line 5 that are not subject to the additional tax (see instructions)	6	
7	Amount subject to additional tax. Subtract line 6 from line 5	7	
8	Additional tax. Enter 10% (0.10) of line 7. Include this amount on Schedule 2 (Form 1040), line 8	8	

Part III Additional Tax on Excess Contributions to Traditional IRAs. Complete this part if you contributed more to your traditional IRAs (which include your traditional SEP IRAs and traditional SIMPLE IRAs) for 2025 than is allowable or you had an amount on line 17 of your 2024 Form 5329.

9	Enter your excess contributions from line 16 of your 2024 Form 5329. See instructions. If zero, go to line 15	9	
10	If your traditional IRA contributions for 2025 are less than your maximum allowable contribution, see instructions. Otherwise, enter -0-	10	
11	2025 traditional IRA distributions included in income (see instructions)	11	
12	2025 distributions of prior year excess contributions to traditional IRAs (see instructions).	12	
13	Add lines 10, 11, and 12.	13	
14	Prior year excess contributions. Subtract line 13 from line 9. If zero or less, enter -0-	14	
15	Excess contributions for 2025 (see instructions)	15	
16	Total excess contributions. Add lines 14 and 15.	16	
17	Additional tax. Enter 6% (0.06) of the smaller of line 16 or the value of your traditional IRAs on December 31, 2025 (including 2025 contributions made in 2026). Include this amount on Schedule 2 (Form 1040), line 8.	17	

Part IV Additional Tax on Excess Contributions to Roth IRAs. Complete this part if you contributed more to your Roth IRAs (which include your Roth SEP IRAs and Roth SIMPLE IRAs) for 2025 than is allowable or you had an amount on line 25 of your 2024 Form 5329.

18	Enter your excess contributions from line 24 of your 2024 Form 5329. See instructions. If zero, go to line 23	18	
19	If your Roth IRA contributions for 2025 are less than your maximum allowable contribution, see instructions. Otherwise, enter -0-	19	
20	2025 distributions from your Roth IRAs (see instructions)	20	
21	Add lines 19 and 20	21	
22	Prior year excess contributions. Subtract line 21 from line 18. If zero or less, enter -0-	22	
23	Excess contributions for 2025 (see instructions)	23	298
24	Total excess contributions. Add lines 22 and 23	24	298
25	Additional tax. Enter 6% (0.06) of the smaller of line 24 or the value of your Roth IRAs on December 31, 2025 (including 2025 contributions made in 2026). Include this amount on Schedule 2 (Form 1040), line 8	25	18

Form **8888**

(Rev. December 2025)

Department of the Treasury
Internal Revenue Service**Allocation of Refund**

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

Go to www.irs.gov/Form8888 for the latest information.

OMB No. 1545-0074

For calendar year

20 25

Attachment

Sequence No. **56**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

Direct Deposit**1a** Amount to be deposited in first account (see instructions)**b** Routing number**d** Account number**2a** Amount to be deposited in second account**b** Routing number**d** Account number**3a** Amount to be deposited in third account**b** Routing number**d** Account number**Reserved for Future Use****4** Reserved for future use**4****Total Allocation of Refund****5** Add lines 1a, 2a, and 3a. The total must equal the refund amount shown on your tax return**5****4,187**

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

Form **8888** (Rev. 12-2025) Created 11/20/25

Part II Vehicle Expenses**Section A—General Information** (You must complete this section if you are claiming vehicle expenses.)

	(a) Vehicle 1	(b) Vehicle 2
11 Enter the date the vehicle was placed in service	11 12/31/2022	
12 Total miles the vehicle was driven during 2025	12 7185 miles	miles
13 Business miles included on line 12	13 1940 miles	miles
14 Percent of business use. Divide line 13 by line 12	14 27.001%	%
15 Average daily roundtrip commuting distance	15 miles	miles
16 Commuting miles included on line 12	16 miles	miles
17 Other miles. Add lines 13 and 16 and subtract the total from line 12	17 5245 miles	miles
18 Was your vehicle available for personal use during off-duty hours?	☒ Yes	☐ No
19 Do you (or your spouse) have another vehicle available for personal use?	☐ Yes	☒ No
20 Do you have evidence to support your deduction?	☐ Yes	☒ No
21 If "Yes," is the evidence written?	☐ Yes	☐ No

Section B—Standard Mileage Rate (See the instructions for Part II to find out whether to complete this section or Section C.)

22 Multiply line 13 by 70¢ (0.70). Enter the result here and on line 1	22 1,358
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Section C—Actual Expenses

	(a) Vehicle 1	(b) Vehicle 2
23 Gasoline, oil, repairs, vehicle insurance, etc.	23	
24a Vehicle rentals	24a	
b Inclusion amount (see instructions)	24b	
c Subtract line 24b from line 24a	24c	
25 Value of employer-provided vehicle (applies only if 100% of annual lease value was included on Form W-2—see instructions)	25	
26 Add lines 23, 24c, and 25	26	
27 Multiply line 26 by the percentage on line 14	27	
28 Depreciation (see instructions)	28	
29 Add lines 27 and 28. Enter total here and on line 1	29	

Section D—Depreciation of Vehicles (Use this section only if you owned the vehicle and are completing Section C for the vehicle.)

	(a) Vehicle 1	(b) Vehicle 2
30 Enter cost or other basis (see instructions)	30	
31 Enter section 179 deduction and special allowance (see instructions).	31	
32 Multiply line 30 by line 14 (see instructions if you claimed the section 179 deduction or special allowance)	32	
33 Enter depreciation method and percentage (see instructions)	33	
34 Multiply line 32 by the percentage on line 33 (see instructions)	34	
35 Add lines 31 and 34	35	
36 Enter the applicable limit explained in the line 36 instructions	36	
37 Multiply line 36 by the percentage on line 14	37	
38 Enter the smaller of line 35 or line 37. If you skipped lines 36 and 37, enter the amount from line 35. Also enter this amount on line 28 above	38	

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

ERIK E MORRIS

**Part II Energy Efficient Home Improvement Credit****Section A--Qualified Energy Efficiency Improvements**

17a Are the qualified energy efficiency improvements installed in or on your main home located in the United States? (See instructions.)	17a	☐ Yes	☐ No
b Are you the original user of the qualified energy efficiency improvements?	17b	☐ Yes	☐ No
c Are the components reasonably expected to remain in use for at least 5 years? If you checked the "No" box for line 17a, 17b, or 17c, you cannot claim the energy efficient home improvement credit. Do not complete Part II, Section A.	17c	☐ Yes	☐ No
d Enter the complete address of the main home where you made the qualifying improvements. Caution: You can only have one main home at a time. (See instructions.)			
Number and street	Unit no.	City or town	State ZIP code
e Were any of these improvements related to the construction of this main home? If you checked the "Yes" box, you can only claim the energy efficient home improvement credit for qualifying improvements that were not related to the construction of the home. Do not include expenses related to the construction of your main home, even if the improvements were made after you moved into the home.	17e	☐ Yes	☐ No
18 Insulation or air sealing material or system.			
a Enter the cost of insulation material or system (include air sealing material or system) specifically and primarily designed to reduce heat loss or gain of your home that meets the criteria established by the IECC. (See instructions.)	18a		
b Multiply line 18a by 30% (0.30). Enter the results. Do not enter more than \$1,200	18b		
19 Exterior doors that meet the applicable Energy Star requirements.			
a Enter the cost of the most expensive door you bought	19a		
b Enter the Qualified Manufacturer Identification Number of the door.			
c Multiply line 19a by 30% (0.30). Do not enter more than \$250	19c		
d Enter the Qualified Manufacturer Identification Number(s) and cost(s) of the two next most expensive door(s)	19d		
(i) \$			
(ii) \$			
e Enter the cost of all other qualifying exterior doors. If none, enter -0-	19e		0
f Add lines 19d and 19e	19f		
g Multiply line 19f by 30% (0.30)	19g		
h Add lines 19c and 19g. Do not enter more than \$500	19h		
20 Windows and skylights that meet the Energy Star certification requirements.			
a Enter the Qualified Manufacturer Identification Number(s) and cost(s) of the four most expensive window(s)/skylight(s)	20a		
(i) \$			
(ii) \$			
(iii) \$			
(iv) \$			
b Enter the cost of all other exterior windows and skylights. If none, enter -0-. (See instructions.)	20b		0
c Add lines 20a and 20b	20c		
d Multiply line 20c by 30% (0.30). Enter the results. Do not enter more than \$600	20d		

21a Did you incur costs for qualified energy property installed on or in connection with a home located in the United States that you use as a residence?

21a	☒ Yes	☐ No
-----	---	-----------------------------

b Was the qualified energy property originally placed into service by you?	21b	☒ Yes	☐ No
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If you checked the "No" box for line 21a or 21b, you cannot claim the credit for your residential energy property costs. Skip lines 22 through 25 and line 29. Go to line 26.

c Enter the complete address of each home where you installed qualified energy property.

Number and street	Unit no.	City or town	State	ZIP code
4219 Briarberry Ln		Tampa	FL	33624

22 Residential energy property costs (include labor costs for onsite preparation, assembly, and original installation). (See instructions.)

a Enter the Qualified Manufacturer Identification Number and cost of the most expensive central air conditioner

N8M7

22a	1,096
-----	-------

b Enter the cost of all other central air conditioners. If none, enter -0-

22b	0
-----	---

c Add lines 22a and 22b

22c	1,096
-----	-------

d Multiply line 22c by 30% (0.30). Enter the results. Do **not** enter more than \$600.

22d 329

23a Enter the Qualified Manufacturer Identification Number(s) and cost(s) of the two most expensive natural gas, propane, or oil water heater(s). If none, enter -0-

23a

(i) _____ \$ _____

(ii) §

b Enter the cost of all other natural gas, propane, or oil water heaters. If none, enter -0-.....

23b	0
-----	---

c Add lines 23a and 23b.

23c	
-----	--

d Multiply line 23c by 30% (0.30). Enter the results. Do **not** enter more than \$600.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000 1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1029 1030 1031 1032 1033 1034 1035 1036 1037 1038 1039 1040 1

24a Enter the Qualified Manufacturer Identification Number and cost of the most expensive natural gas, propane, or oil furnace or hot water boiler

24a

b Enter the cost of all other natural gas, propane, or oil furnace or hot water boilers. If none, enter -0-

24b	0
-----	---

c Add lines 24a and 24b.

24c	
-----	--

d Multiply line 24c by 30% (0.30). Enter the results. Do **not** enter more than \$600

.....

25a Did you install improvements or replacements of panelboards, subpanelboards, branch circuits, or feeders (enabling property) to enable the installation and use of a separate qualified energy efficient improvement or qualified energy property (enabled property), and were both the enabling property and the enabled property installed in 2025? (See instructions if some of the property was installed in 2024.)
If you checked the "No" box, you cannot claim the credit for enabling property. Skip lines 25b through 25e. Go to line 26. (See instructions.)

25a	☐	Yes	☐	No
-----	--------------------------	-----	--------------------------	----

b If you checked the "Yes" box for line 25a, enter the code for the type of enabled property. (See instructions.)

Code(s)			

c Enter the cost of improvements or replacement of enabling property **25c**

25c

d Enter the Qualified Manufacturer Identification Number(s) of the enabling property.

(i)

(ii)

e Multiply line 25c by 30% (0.30). Enter the results. Do **not** enter more than \$600

25e

Section B—Residential Energy Property Expenditures (continued)

26 Home energy audits.			
a Did you incur costs for a home energy audit that included an inspection of your main home located in the United States and a written report prepared by a certified home energy auditor? (See instructions.) If you checked the "No" box, you cannot claim the home energy audit credit. Stop. Go to line 27.		26a	☐ Yes ☒ No
b Enter the cost of the home energy audits		26b	
c Multiply line 26b by 30% (0.30). Enter the results. Do not enter more than \$150		26c	
27 Add lines 18b, 19h, 20d, 22d, 23d, 24d, 25e, and 26c		27	329
28 Enter the smaller of line 27 or \$1,200		28	329
29 Heat pumps and heat pump water heaters; biomass stoves and biomass boilers.			
a Enter the Qualified Manufacturer Identification Number and cost of the most expensive electric or natural gas heat pump		29a	
b Enter the cost of all other electric or natural gas heat pumps. If none, enter -0-		29b	0
c Enter the Qualified Manufacturer Identification Number and cost of the most expensive electric or natural gas heat pump water heater		29c	
d Enter the cost of all other electric or natural gas heat pump water heaters. If none, enter -0-		29d	0
e Enter the Qualified Manufacturer Identification Number and cost of the most expensive biomass stove or boiler		29e	
f Enter the cost of all other biomass stoves and biomass boilers. If none, enter -0-		29f	0
g Add lines 29a through 29f		29g	
h Multiply line 29g by 30% (0.30). Enter the results. Do not enter more than \$2,000		29h	
30 Add lines 28 and 29h		30	329
31 Limitation based on tax liability. Enter the amount from the Energy Efficient Home Improvement Credit Limit Worksheet. (See instructions.)		31	12,239
32 Energy efficient home improvement credit. Enter the smaller of line 30 or line 31. Also include this amount on Schedule 3 (Form 1040), line 5b		32	329
a If the special rule for joint occupants applies, check here ☐ and attach a statement. (See instructions.)			
b If you live in a condominium or cooperative and have a fractional share of the qualified energy efficiency improvements or residential energy property expenditures, check here ☐ . (See instructions.)			

(Rev. December 2025)

Department of the Treasury
Internal Revenue Service**Noncash Charitable Contributions****Attach one or more Forms 8283 to your tax return if you claimed a total deduction of over \$500 for all contributed property.****Go to www.irs.gov/Form8283 for instructions and the latest information.**

OMB No. 1545-0074

Attachment

Sequence No. **36**

Name(s) shown on your income tax return

ERIK E MORRIS & DANDAN SUI

Identifying number

Enter the entity name and identifying number from the tax return where the noncash charitable contribution was originally reported, if different from above.

Name:

Identifying number:

Check this box if a family pass-through entity made the non-cash charitable contribution. See instructions ☐**Note:** Figure the amount of your contribution deduction before completing this form. See your tax return instructions.**Section A. Donated Property of \$5,000 or Less and Publicly Traded Securities** -- List in this section **only** an item

(or a group of similar items) for which you claimed a deduction of \$5,000 or less. Also list publicly traded securities and certain other property even if the deduction is more than \$5,000. If you need more space, attach a statement. See instructions.

1	(a) Name and address of the donee organization	(b) If donated property is a vehicle (see instructions), check the box. Also enter the vehicle identification number (unless Form 1098-C is attached).	(c) Description and condition of donated property (For a vehicle, enter the year, make, model, and mileage. For securities and other property, see instructions.)
A	GOODWILL 10596 GANDY BLVD SAINT PETERSBURG FL 33702	☐	Clothes Small items
B	GOODWILL 10596 GANDY BLVD SAINT PETERSBURG FL 33702	☐	Bedding Small Furniture Shoes
C	PARALYZED VETS OF AMER 1875 EYE STREET NW WASHINGTON DC 20006	☐	boxes of clothes
D	AMERICAN RED CROSS 3310 W MAIN STREET TAMPA FL 33607	☐	Boxes of Clothes Small I tems

Note: If the amount you claimed as a deduction for an item is \$500 or less, you do not have to complete columns (e), (f), and (g).

	(d) Date of the contribution	(e) Date acquired by donor (mo., yr.)	(f) How acquired by donor	(g) Donor's cost or adjusted basis	(h) Fair market value (see insts.)	(i) Method used to determine the fair market value
A	10/01/2025	VARIOUS	PURCHASED	450	125	RESALE VALUE
B	09/15/2025	VARIOUS	PURCHASED	1,700	500	THRIFT STORE VALUE
C	11/01/2025	VARIOUS	PURCHASED	360	100	RESALE VALUE
D	12/01/2025	VARIOUS	PURCHASED	500	200	RESALE VALUE

Section B. Donated Property Over \$5,000 (Except Publicly Traded Securities, Vehicles, Intellectual Property or Inventory Reportable in Section A) -- Complete this section for one item (or a group of similar items) for which you claimed a deduction of more than \$5,000 per item or group (except contributions reportable in Section A). Provide a separate form for each item donated unless it is part of a group of similar items. A qualified appraisal is required for items reportable in Section B and in certain cases must be attached. See instructions.**Part I Information on Donated Property****2** Check the box that describes the type of property donated. See instructions for definitions.**a** ☐ Art (contribution of \$20,000 or more)**b** ☐ Qualified conservation contribution**b(1)** ☐ Certified historic structure

NPS # _____

c ☐ Art (contribution of less than \$20,000)**d** ☐ Other real estate**e** ☐ Equipment**f** ☐ Securities**g** ☐ Collectibles**h** ☐ Intellectual property**i** ☐ Vehicles**j** ☐ Clothing and household items**k** ☐ Digital assets**l** ☐ Other

3	(a) Description of donated property (if you need more space, attach a separate statement)	(b) If any tangible personal property or real property was donated, give a brief summary of the overall physical condition of the property at the time of the gift.	(c) Appraised fair market value
A			
B			
C			

	(d) Date acquired by donor (mo., yr.)	(e) How acquired by donor	(f) Donor's cost or adjusted basis	(g) For bargain sales, enter amount received	(h) Qualified conservation contribution relevant basis (see instructions)	(i) Amount claimed as a deduction (see instructions)
A						
B						
C						

For Paperwork Reduction Act Notice, see separate instructions.Form **8283** (Rev. 12-2025) Created 7/1/25

Form **4562**Department of the Treasury
Internal Revenue Service**Depreciation and Amortization**
(Including Information on Listed Property)

Attach to your tax return.

Go to www.irs.gov/Form4562 for instructions and the latest information.

OMB No. 1545-0172

2025Attachment
Sequence No. **179**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

Business or activity to which this form relates

SCH E P1 SINGL FMLY RESIDENCE

Part I Election To Expense Certain Property Under Section 179**Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions.	5	0
6	(a) Description of property	(b) Cost (busn. use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2024 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions.	11	
12	Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	0
13	Carryover of disallowed deduction to 2026. Add lines 9 and 10, less line 12	13	

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year. See instructions	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Don't include listed property. See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2025	17	2
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ☐		

Section B -- Assets Placed in Service During 2025 Tax Year Using the General Depreciation System

(a) Classification of property (see instructions)	(b) Month and year placed in service	(c) Basis for depr. (business/investment use only -- see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h 50-year property			50 yrs.	MM	S/L	
i Residential rental property			27.5 yrs.	MM	S/L	
j Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C -- Assets Placed in Service During 2025 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 30-year			30 yrs.	MM	S/L	
d 40-year			40 yrs.	MM	S/L	
e 50-year			50 yrs.	MM	S/L	

For Paperwork Reduction Act Notice, see separate instructions.

Form **4562** (2025) Created 10/9/25

Part IV Summary (See instructions.)

21 Listed property. Enter amount from line 28	21	1,744
22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations -- see instructions	22	1,746
23a For assets shown in Part III that are placed in service during the current tax year, and have costs capitalized under section 263A, enter the amount of the basis attributable to interest costs capitalized under section 263A(f)	23a	
b For assets shown in Part III that are placed in service during the current tax year, and have costs capitalized under section 263A, enter the amount of the basis attributable to costs capitalized under section 263A other than interest costs capitalized under section 263A(f)	23b	

Part V Listed Property (Include automobiles, certain other vehicles, certain aircraft, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A -- Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed?								☒ Yes	☐ No
b If "Yes," is the evidence written?								☐ Yes	☒ No
c Do you own, lease, or charter an aircraft? Check all that apply. See instructions								☐ Own	☐ Lease
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Busn./ investment use percentage	(d) Cost or other basis	(e) Basis for depr. (busn./investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost	
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use. See instructions								25	
26 Property used more than 50% in a qualified business use:									
		%							
		%							
		%							
27 Property used 50% or less in a qualified business use:									
Toyota Prii	12/31/2022	27.00%	40,000	9,838	5	S/L- HY	1,744		
		%				S/L-			
		%				S/L-			
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21								28	1,744
29 Add amounts in column (i), line 26. Enter here and on line 7								29	

Section B -- Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

30 Total business/investment miles driven during the year (don't include commuting miles)	(a) Vehicle 1 1,940	(b) Vehicle 2	(c) Vehicle 3	(d) Vehicle 4	(e) Vehicle 5	(f) Vehicle 6
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven	5,245					
33 Total miles driven during the year. Add lines 30 through 32	7,185					
34 Was the vehicle available for personal use during off-duty hours?	☒ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
35 Was the vehicle used primarily by a more than 5% owner or related person?	☐ Yes ☒ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
36 Is another vehicle available for personal use?	☐ Yes ☒ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

Form 4562 (2025)

2025 WAGES AND SALARIES SUMMARY ATTACHMENT

ERIK E MORRIS & DANDAN SUI

Employer Name	Employer EIN	T or S	Wages	Federal Withholding	Social Security Tax Withheld	State	State Wages	State Tax Withheld	Local Tax Withheld
QUINCE IMAGING INC	[REDACTED]	T	101,759	12,994	6,808	FL			
Cabarrus County Schools		S	32,466	3,121	2,013	NC	32,466	1,265	

Total			134,225	16,115	8,821		32,466	1,265	
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2025 MISCELLANEOUS/NEC INCOME SUMMARY ATTACHMENT

ERIK E MORRIS & DANDAN SUI

Payer Name	Payer's Federal ID Number	T or S	Form	Activity	Rent (Box 1)	Royalties (Box 2)	Other Income (Box 3)	NonEmp Comp (NEC Box 1)	Federal Tax Withheld (Box 4)	State	State Income (Box 18)	State Tax Withheld (Box 16)
Red Door Invest		T	MISC	SCH E	24,815							

TOTAL

24,815

2025 FEDERAL TAX WITHHOLDINGS ATTACHMENT

ERIK E MORRIS & DANDAN SUI

W-2	QUINCE IMAGING INC	12,994
W-2	Cabarrus County Schools	3,121

Total to Form 1040/1040-SR line 25d 16,115

2025 SCHEDULE A - STATE AND LOCAL TAX ATTACHMENT

ERIK E MORRIS & DANDAN SUI

NC STATE W2 W/H FROM Cabarrus County Schools

1,265

TOTAL TO SCHEDULE A LINE 5A

1,265

2025 IRA RECORD WORKSHEET

ERIK E MORRIS

Year	Basis In Contributions	Nontaxable Distributions from Prior Years	Current Year Nontaxable Distributions	Cumulative Basis	FMV on 12/31 (as reported on Form 5498)
UNSPCFD	77,051			77,051	
2022				77,051	
2023				77,051	
2025				77,051	77,051

UNSPCFD = Year not specified (not known)

2025 ROTH IRA RECORD WORKSHEET

ERIK E MORRIS

[illegible]

2025 QUALIFIED DIVIDENDS and CAPITAL GAIN TAX WORKSHEET - LINE 16

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

- Before you begin:** ✓ See the instructions for line 16 in the instructions to see if you can use this worksheet to figure your tax.
 ✓ Before completing this worksheet, complete Form 1040 or 1040-SR through line 15.
 ✓ If you do not have to file Schedule D and you received capital gain distributions, be sure you checked the box on Form 1040 or 1040-SR, line 7.

1. Enter the amount from Form 1040 or 1040-SR, line 15. However, if you are filing Form 2555 (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	<u>102,348</u>
2. Enter the amount from Form 1040 or 1040-SR, line 3a*	2.	<u>1,492</u>
3. Are you filing Schedule D?*		
X Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0-	3.	<u>0</u>
No. Enter the amt from Fm 1040 or 1040-SR, ln 7.		
4. Add lines 2 and 3	4.	<u>1,492</u>
5. Subtract line 4 from line 1. If zero or less, enter -0-	5.	<u>100,856</u>
6. Enter: \$48,350 if single or married filing separately, \$96,700 if married filing jointly or Qualifying surviving spouse, \$64,750 if head of household.	6.	<u>96,700</u>
7. Enter the smaller of line 1 or line 6	7.	<u>96,700</u>
8. Enter the smaller of line 5 or line 7	8.	<u>96,700</u>
9. Subtract line 8 from line 7. This amount is taxed at 0%	9.	<u>0</u>
10. Enter the smaller of line 1 or line 4	10.	<u>1,492</u>
11. Enter the amount from line 9	11.	<u>0</u>
12. Subtract line 11 from line 10	12.	<u>1,492</u>
13. Enter: \$533,400 if single, \$300,000 if married filing separately, \$600,050 if married filing jointly or Qualifying surviving spouse, \$566,700 if head of household.	13.	<u>600,050</u>
14. Enter the smaller of line 1 or line 13	14.	<u>102,348</u>
15. Add lines 5 and 9	15.	<u>100,856</u>
16. Subtract line 15 from line 14. If zero or less, enter -0-	16.	<u>1,492</u>
17. Enter the smaller of line 12 or line 16	17.	<u>1,492</u>
18. Multiply line 17 by 15% (0.15)	18.	<u>224</u>
19. Add lines 9 and 17	19.	<u>1,492</u>
20. Subtract line 19 from line 10	20.	<u>0</u>
21. Multiply line 20 by 20% (0.20)	21.	<u>0</u>
22. Figure the tax on the amount on line 5. If the amount on line 5 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 5 is \$100,000 or more, use the Tax Computation Worksheet	22.	<u>12,016</u>
23. Add lines 18, 21, and 22	23.	<u>12,240</u>
24. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	24.	<u>12,345</u>
25. Tax on all taxable income. Enter the smaller of line 23 or line 24. Also include this amount on the entry space on Form 1040 or 1040-SR, line 16. If you are filing Form 2555, don't enter this amount on the entry space on Form 1040 or 1040-SR, line 16. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	25.	<u>12,240</u>

* If you are filing Form 2555, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.

2025 AUTO EXPENSE WORKSHEET

ERIK E MORRIS

Keep for Your Records

SECTION

- | | | |
|--|------------------------|----------------------|
| 1. Vehicle description | 1. <u>Toyota Prius</u> | |
| 2. Carried to form or schedule | 2. _____ | |
| 3. Date vehicle was placed in service | | 3. <u>12/31/2022</u> |
| 4. Odometer beginning mileage <u>11,254</u> ending mileage <u>18,439</u> | | |

CALCULATION OF BUSINESS USE PERCENTAGE

- | | |
|--|-----------------------|
| 5. Total business mileage driven during the year | 5. <u>1,940</u> |
| 6. Total commuting mileage driven during the year | 6. _____ |
| 7. Total medical mileage driven during year (to Sch A, Ln 1) | 7. _____ |
| 8. Total charitable mileage driven during the year (to Sch A, Ln 11) | 8. _____ |
| 9. Total other personal mileage driven during the year | 9. <u>5,245</u> |
| 10. Total mileage driven during the year | 10. <u>7,185</u> |
| 11. Business use percentage (Line 5 divided by Line 10) | 11. <u>27.00000 %</u> |

CALCULATION OF THE STANDARD MILEAGE RATE METHOD

- | | Input | Deduction Allowed |
|--|----------------------|-------------------|
| 12. Business miles driven | <u>1,940</u> x .70 | 12. <u>1,358</u> |
| 13. Parking fees and tolls | <u>291</u> | *13. <u>291</u> |
| 14. Total automobile expenses (Line 12 through Line 13) (carries to auto expense line of form on Line 2) | | 14. <u>1,649</u> |
| 15. Interest expense (carries to interest expense line of form on Line 2) | <u>802</u> x Line 11 | 15. <u>217</u> |
| 16. Property tax (carries from taxes line of form on Line 2) | _____ x Line 11 | 16. _____ |
| 17. Property tax to Schedule A, Line 5c (Line 16 input less Line 16 deduction allowed) | | 17. _____ |
| 18. Total expenses using SMR Method (Line 14 through Line 16) | | 18. <u>1,866</u> |
| 19. Standard Mileage Rate Depreciation Allowance | | |
| Total business mileage driven during the year | <u>1,940</u> x .33 | 19. <u>582</u> |
| 20. Prior depreciation allowance | | 20. _____ |
| 21. Accumulated depreciation allowance (Line 19 + 20) | | 21. <u>582</u> |

CALCULATION OF THE ACTUAL EXPENSE METHOD

- | | Input | Deduction Allowed |
|---|----------------------|-------------------|
| 22. Parking fees and tolls | <u>291</u> | *22. <u>291</u> |
| 23. Gasoline and oil | _____ x Line 11 | 23. _____ |
| 24. Repairs | _____ x Line 11 | 24. _____ |
| 25. Licensing fees | _____ x Line 11 | 25. _____ |
| 26. Registration fees | _____ x Line 11 | 26. _____ |
| 27. Insurance | _____ x Line 11 | 27. _____ |
| 28. Other expenses | _____ x Line 11 | 28. _____ |
| 29. Total automobile expenses (Line 22 through 28) (carries to auto expense line of form on Line 2) | | 29. <u>291</u> |
| 30. Property tax (carries to taxes line of form on Line 2) | _____ x Line 11 | 30. _____ |
| 31. Property tax to Schedule A, Line 5c (Line 30 input less Line 30 deduction allowed) | | 31. _____ |
| 32. Interest expense (carries to interest expense line of form on Line 2) | <u>802</u> x Line 11 | 32. <u>217</u> |
| 33. Lease payments | _____ x Line 11 | 33. _____ |
| 34. Inclusion amount | _____ x Line 11 | 34. _____ |
| 35. Total lease expense (Line 33 less Line 34) (carries to lease expense line of form on Line 2) | | 35. _____ |
| 36. Section 179 expense deduction | | *36. _____ |
| 37. Special depreciation allowance | | **37. _____ |
| 38. Current depreciation expense | | **38. _____ |
| 39. Total depreciation expense (Line 36 to Line 38) (carries to depreciation expense line of form on Line 2) | | 39. _____ |
| 40. Value of employer-provided vehicle | _____ x Line 11 | 40. _____ |
| 41. Total expenses using Actual Expense Method (total of Lines 29, 30, 32, 35, 39, and 40) | | 41. <u>508</u> |

* Not subject to business use percentage.

** Already adjusted for business use percentage.

DEDUCTION TAKEN

Standard Mileage Rate

1,866

Actual Expenses

Note: The program automatically optimizes between the Actual and SMR methods for the first year the vehicle was placed in service. Otherwise, the program carries forward the method used the previous year. See the tax code and regulations for information on switching between the Actual and SMR methods in subsequent years.

2025 AUTO EXPENSE WORKSHEET

ERIK E MORRIS

Keep for Your Records

ION

- | | |
|---|-----------------------------------|
| 1. Vehicle description | 1. <u>Toyota Prius</u> |
| 2. Carried to form or schedule | 2. <u>For Form Schedule E # 1</u> |
| 3. Date vehicle was placed in service | 3. <u>12/31/2022</u> |
| 4. Odometer beginning mileage | ending mileage |

CALCULATION OF BUSINESS USE PERCENTAGE

- | | |
|--|-----------------------|
| 5. Total business mileage driven during the year | 5. <u>1,940</u> |
| 6. Total commuting mileage driven during the year | 6. _____ |
| 7. Total medical mileage driven during year (to Sch A, Ln 1) | 7. _____ |
| 8. Total charitable mileage driven during the year (to Sch A, Ln 11) | 8. _____ |
| 9. Total other personal mileage driven during the year | 9. <u>5,245</u> |
| 10. Total mileage driven during the year | 10. <u>7,185</u> |
| 11. Business use percentage (Line 5 divided by Line 10) | 11. <u>27.00000 %</u> |

CALCULATION OF THE STANDARD MILEAGE RATE METHOD

- | | Input | | Deduction Allowed |
|--|----------------------|------------|-------------------|
| 12. Business miles driven | <u>1,940</u> x .70 | 12. _____ | <u>1,358</u> |
| 13. Parking fees and tolls | <u>390</u> | *13. _____ | <u>390</u> |
| 14. Total automobile expenses (Line 12 through Line 13) (carries to auto expense line of form on Line 2) | | 14. _____ | <u>1,748</u> |
| 15. Interest expense (carries to interest expense line of form on Line 2) | <u>802</u> x Line 11 | 15. _____ | <u>217</u> |
| 16. Property tax (carries from taxes line of form on Line 2) | _____ x Line 11 | 16. _____ | |
| 17. Property tax to Schedule A, Line 5c (Line 16 input less Line 16 deduction allowed) | | 17. _____ | |
| 18. Total expenses using SMR Method (Line 14 through Line 16) | | 18. _____ | <u>1,965</u> |
| 19. Standard Mileage Rate Depreciation Allowance | | | |
| Total business mileage driven during the year | <u>1,940</u> x .33 | 19. _____ | <u>582</u> |
| 20. Prior depreciation allowance | | 20. _____ | |
| 21. Accumulated depreciation allowance (Line 19 + 20) | | 21. _____ | <u>582</u> |

CALCULATION OF THE ACTUAL EXPENSE METHOD

- | | Input | | Deduction Allowed |
|---|----------------------|-------------|-------------------|
| 22. Parking fees and tolls | <u>390</u> | *22. _____ | <u>390</u> |
| 23. Gasoline and oil | <u>498</u> x Line 11 | 23. _____ | <u>134</u> |
| 24. Repairs | <u>889</u> x Line 11 | 24. _____ | <u>240</u> |
| 25. Licensing fees | _____ x Line 11 | 25. _____ | |
| 26. Registration fees | _____ x Line 11 | 26. _____ | |
| 27. Insurance | <u>50</u> x Line 11 | 27. _____ | <u>14</u> |
| 28. Other expenses | <u>25</u> x Line 11 | 28. _____ | <u>7</u> |
| 29. Total automobile expenses (Line 22 through 28) (carries to auto expense line of form on Line 2) | | 29. _____ | <u>785</u> |
| 30. Property tax (carries to taxes line of form on Line 2) | _____ x Line 11 | 30. _____ | |
| 31. Property tax to Schedule A, Line 5c (Line 30 input less Line 30 deduction allowed) | | 31. _____ | |
| 32. Interest expense (carries to interest expense line of form on Line 2) | <u>802</u> x Line 11 | 32. _____ | <u>217</u> |
| 33. Lease payments | _____ x Line 11 | 33. _____ | |
| 34. Inclusion amount | _____ x Line 11 | 34. _____ | |
| 35. Total lease expense (Line 33 less Line 34) (carries to lease expense line of form on Line 2) | | 35. _____ | |
| 36. Section 179 expense deduction | | *36. _____ | |
| 37. Special depreciation allowance | | **37. _____ | |
| 38. Current depreciation expense | | **38. _____ | <u>1,744</u> |
| 39. Total depreciation expense (Line 36 to Line 38) (carries to depreciation expense line of form on Line 2) | | 39. _____ | <u>1,744</u> |
| 40. Value of employer-provided vehicle | _____ x Line 11 | 40. _____ | |
| 41. Total expenses using Actual Expense Method (total of Lines 29, 30, 32, 35, 39, and 40) | | 41. _____ | <u>2,746</u> |

* Not subject to business use percentage.

** Already adjusted for business use percentage.

DEDUCTION TAKEN Standard Mileage Rate _____ Actual Expenses 2,746

Note: The program automatically optimizes between the Actual and SMR methods for the first year the vehicle was placed in service. Otherwise, the program carries forward the method used the previous year. See the tax code and regulations for information on switching between the Actual and SMR methods in subsequent years.

SCHEDULE D AMT
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

FOR AMT PURPOSES ONLY

2025

Attachment
Sequence No. **12**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

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

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

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see inst.). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.	170	221		-51
1b Totals for all transactions reported on Form(s) 8949 with Box A or Box G checked.				
2 Totals for all transactions reported on Form(s) 8949 with Box B or Box H checked.	2			2
3 Totals for all transactions reported on Form(s) 8949 with Box C or Box I checked.				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824.				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions.				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2.				7 -49

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B or Form 1099-DA for which basis was reported to the IRS and for which you have no adjustments (see inst.). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.	168	441		-273
8b Totals for all transactions reported on Form(s) 8949 with Box D or Box J checked.				
9 Totals for all transactions reported on Form(s) 8949 with Box E or Box K checked.				
10 Totals for all transactions reported on Form(s) 8949 with Box F or Box L checked.				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824.				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1.				12
13 Capital gain distributions. See the instructions.				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions.				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2.				15 -273

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

Schedule D (Form 1040) 2025 Created 10/6/25

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	-322
● If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7a. Then, go to line 17 below. ● If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. ● If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7a. Then go to line 22.			
17	Are lines 15 and 16 both gains? ☐ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18	If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet	18	
19	If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet	19	
20	Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7a, the smaller of: ● The loss on line 16; or ● (\$3,000), or if married filing separately, (\$1,500)	21	(322)
Note: When figuring which amount is smaller, treat both amounts as positive numbers.			
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Sales and Other Dispositions of Capital Assets

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

Go to www.irs.gov/Form8949 for instructions and the latest information.

OMB No. 1545-0074

2025

Attachment
Sequence No. **12A**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

Before you check Box A, B, C, G, H, or I below, see whether you received any Form(s) 1099-B, Form(s) 1099-DA, or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B or Form 1099-DA. They 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 and Form(s) 1099-DA 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, C, G, H, or I 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 was not reported to the IRS |
| ☐ | (C) Short-term transactions, other than digital asset transactions, not reported to you on Form 1099-B or Form 1099-DA |
| ☐ | (G) Short-term transactions reported on Form(s) 1099-DA showing basis was reported to the IRS (see Note above) |
| ☐ | (H) Short-term transactions reported on Form(s) 1099-DA showing basis was not reported to the IRS |
| ☐ | (I) Short-term digital asset transactions not reported to you on Form 1099-DA or Form 1099-B |

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	06 GAMESTOP COR P NEW WTS EXP 1	10-07-25	10-08-25	2	0			2
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Sch. D, line 1b (if Box A or Box G above is checked), line 2 (if Box B or Box H above is checked), or line 3 (if Box C or Box I above is checked)				2	0			2

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

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

Form 8949 (2025) Created 5/5/25

SCHEDULE E AMT
(Form 1040)

Department of the Treasury
Internal Revenue Service

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

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

FOR AMT PURPOSES ONLY

2025

Attachment
Sequence No. **13**

Name(s) shown on return

ERIK E MORRIS & DANDAN SUI

Part I **Income or Loss From Rental Real Estate and Royalties** Note: If you are in the business of renting personal property, use **Schedule C**. See instructions. If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

A Did you make any payments in 2025 that would require you to file Form(s) 1099? See instructions **Yes** ☒ **No**

B If "Yes," did you or will you file required Form(s) 1099? **Yes** ☐ **No** ☐

1a Physical address of each property (street, city, state, ZIP code)

A 1904 South 9th Street, Haines City, FL 33844

B

C

1b	Type of Property (from list below)	2	Fair Rental Days	Personal Use Days	QJV
A	1	For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	A 365		
B			B		
C			C		

Type of Property:

- | | | | |
|---------------------------|------------------------------|-------------|--------------------|
| 1 Single Family Residence | 3 Vacation/Short-Term Rental | 5 Land | 7 Self-Rental |
| 2 Multi-Family Residence | 4 Commercial | 6 Royalties | 8 Other (describe) |

Income:

	A	B	C
3 Rents received	24,815		
4 Royalties received			

Expenses:

5 Advertising	5		
6 Auto and travel (see instructions)	6	785	
7 Cleaning and maintenance	7	1,919	
8 Commissions	8		
9 Insurance	9	2,679	
10 Legal and other professional fees	10		
11 Management fees	11	1,968	
12 Mortgage interest paid to banks, etc. (see instructions)	12	5,146	
13 Other interest	13	217	
14 Repairs	14	884	
15 Supplies	15		
16 Taxes	16	5,011	
17 Utilities	17		
18 Depreciation expense or depletion	18	1,746	
19 Other (list)	19		
20 Total expenses. Add lines 5 through 19	20	20,355	
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	4,460	
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	() () ()	

23a Total of all amounts reported on line 3 for all rental properties	23a	24,815	
b Total of all amounts reported on line 4 for all royalty properties	23b		
c Total of all amounts reported on line 12 for all properties	23c	5,146	
d Total of all amounts reported on line 18 for all properties	23d	1,746	
e Total of all amounts reported on line 20 for all properties	23e	20,355	

24 Income. Add positive amounts shown on line 21. Do not include any losses	24	4,460
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25	()
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, and IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2	26	4,460

For Paperwork Reduction Act Notice, see the separate instructions.

Schedule E (Form 1040) 2025 Created 5/6/25

ENERGY EFFICIENT HOME IMPROVEMENT
CREDIT LIMIT WORKSHEET - LINE 31

ERIK E. MORRIS

Keep for Your Records

Use this worksheet to figure your credit limit.

1. Enter the amount from Form 1040, 1040-SR, or Form 1040-NR, line 18 1. 12,240
2. Enter the total of the following credit(s)/adjustment(s) if you are taking the credit(s)/adjustment(s) on your 2025 income tax return:
 - + Amount on Schedule 3 (Form 1040), line 6l
 - + Foreign Tax Credit, Schedule 3 (Form 1040), line 1 1
 - + Credit for Child or Dependent Care Expenses, Schedule 3 (Form 1040), line 2
 - + Credit for the Elderly or the Disabled, Schedule 3 (Form 1040), line 6d
 - + Nonrefundable Education Credits, Schedule 3 (Form 1040), line 3
 - + Retirement Savings Contributions Credit, Schedule 3 (Form 1040), line 4

Note. Enter the total of the preceding credit(s)/adjustment(s), only if allowed and taken on your 2025 income tax return. Not all credits/adjustments are available for all years nor for all filers. See the instructions for your 2025 income tax return 2. 1
3. Subtract line 2 from line 1. Also enter this amount on Form 5695, line 31.
If zero or less, enter -0- on Form 5695, line 31 and 32 3. 12,239

2025 INVESTMENT INCOME WORKSHEET FOR EIC

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

Publication 596

Use this worksheet to figure investment income for the EIC when you file Form 1040 or 1040-SR.

Interest and Dividends

1. Enter any amount from Form 1040 or 1040-SR, line 2b 1. 671
2. Enter any amount from Form 1040 or 1040-SR, line 2a, plus any amount on Form 8814, line 1b 2.
3. Enter any amount from Form 1040 or 1040-SR, line 3b 3. 1,498
4. Enter the amount from Schedule 1 (Form 1040), line 8z, that is from Form 8814 if you are filing that form to report your child's interest and dividend income on your return. (If your child received an Alaska Permanent Fund dividend, use Worksheet 2 in this chapter to figure the amount to enter on this line.) . . . 4.

Capital Gain Net Income

5. Enter the amount from Form 1040 or 1040-SR, line 7. If the amount on that line is a loss, enter -0- 5. 0
6. Enter any gain from Form 4797, Sales of Business Property, line 7. If the amount on that line is a loss, enter -0-. (But, if you completed lines 8 and 9 of Form 4797, enter the amount from line 9 instead.) 6. 0
7. Subtract line 6 of this worksheet from line 5 of this worksheet. (If the result is less than zero, enter -0-.) 7. 0

Royalties and Rental Income From Personal Property

8. Enter any royalty income from Schedule E, line 23b, plus any income from the rental of personal property shown on Schedule 1 (Form 1040), line 8l 8.
9. Enter any expenses from Schedule E, line 20, related to royalty income, plus any expenses from the rental of personal property deducted on Schedule 1 (Form 1040), line 24b 9.
10. Subtract the amount on line 9 of this worksheet from the amount on line 8. (If the result is less than zero, enter -0-.) 10. 0

Passive Activities

11. Enter the total of any net income from passive activities (such as income included on Schedule E, line 26, 29a (col. (h)), 34a (col. (d)), or 40; or an ordinary gain identified as "FPA" on Form 4797, line 10). (See instructions below for lines 11 and 12.) 11. 4,460
12. Enter the total of any losses from passive activities (such as losses included on Schedule E, line 26, 29b (col. (g)), 34b (col. (c)), or 40; or an ordinary loss identified as "PAL" on Form 4797, line 10). (See instructions below for lines 11 and 12.) 12. 0
13. Combine the amounts on lines 11 and 12 of this worksheet. (If the result is less than zero, enter -0-.) 13. 4,460
14. Add the amounts on lines 1, 2, 3, 4, 7, 10, and 13. Enter the total. **This is your investment income** 14. 6,629
15. Is the amount on line 14 more than \$11,950?
☐ Yes. You can't take the credit.
☒ No. Go to Step 3 of the Form 1040 instructions for line 27 to find out if you can take the credit (unless you are using this publication to find out if you can take the credit; in that case, go to Rule 7 next).

Instructions for lines 11 and 12. In figuring the amount to enter on lines 11 and 12, don't take into account any royalty income (or loss) included on line 26 of Schedule E or any income (or loss) included in your earned income or on line 1, 2, 3, 4, 7, or 10 of this worksheet. To find out if the income on line 26 or line 40 of Schedule E is from a passive activity, see the Schedule E instructions. If any of the rental real estate income (or loss) included on Schedule E, line 26, isn't from a passive activity, enter "NPA" and the amount of that income (or loss) on the dotted line next to line 26.

2025 MAXIMUM ROTH IRA CONTRIBUTION WORKSHEET

ERIK E MORRIS

Keep for Your Records

Caution: If married filing jointly and the combined taxable compensation (defined in the instructions) for you and your spouse is less than \$14,000, (\$15,000 if one spouse is 50 or older at the end of 2025; \$16,000 if both spouses are 50 or older at the end of 2025), Line 1 will be limited to the taxable compensation. See Pub. 590-A for special rules.

- | | | |
|--|-----|-----------------------------|
| 1. If married filing jointly, enter \$7,000 (\$8,000 if age 50 or older at the end of 2025). All others, enter the smaller of \$7,000 (\$8,000 if age 50 or older at the end of 2025) or your taxable compensation (defined in the instructions) | 1. | <u>7,000</u> |
| 2. Enter your total contributions to traditional IRAs for 2025 | 2. | <u> </u> |
| 3. Subtract line 2 from line 1. | 3. | <u>7,000</u> |
| 4. Enter: \$246,000 if married filing jointly; or qualifying surviving spouse; \$10,000 if married filing separately and you lived with your spouse at any time in 2025. All others, enter \$165,000 | 4. | <u>246,000</u> |
| 5. Enter your modified AGI for Roth IRA purposes (see worksheet below) | 5. | <u>140,520</u> |
| 6. Subtract line 5 from line 4. If zero or less, stop here ; you may not contribute to a Roth IRA for 2025. See Recharacterizations in the instructions if you made Roth IRA contributions for 2025 | 6. | <u>105,480</u> |
| 7. If line 4 above is \$165,000, enter \$15,000; otherwise, enter \$10,000. If line 6 is more than or equal to line 7, skip lines 8 and 9 and enter the amount from line 3 on line 10 | 7. | <u>10,000</u> |
| 8. Divide line 6 by line 7 and enter the result as a decimal (rounded to at least 3 places) | 8. | <u> </u> |
| 9. Multiply line 1 by line 8. If the result is not a multiple of \$10, increase it to the next multiple of \$10 (for example, round \$490.30 to \$500). Enter the result, but not less than \$200 | 9. | <u> </u> |
| 10. Maximum 2025 Roth IRA Contribution. Enter the smaller of line 3 or line 9. See Recharacterizations in the instructions if you contributed more than this amount to Roth IRAs for 2025 | 10. | <u>7,000</u> |

Modified AGI For Purposes of Roth IRAs

- | | | |
|---|-----|-----------------------------|
| 1. Enter your adjusted gross income | 1. | <u>140,520</u> |
| 2. Enter the taxable amount of Roth conversions | 2. | <u> </u> |
| 3. Subtract line 2 from line 1. If less than zero, enter -0- | 3. | <u>140,520</u> |
| 4a. Traditional IRA deduction claimed | 4a. | <u> </u> |
| b. Student loan interest deduction claimed | 4b. | <u> </u> |
| c. Exclusion of qualified bond interest from Form 8815 | 4c. | <u> </u> |
| d. Exclusion of employer-provided adoption exp from Form 8839 .. | 4d. | <u> </u> |
| e. Foreign earned income and/or housing exclusion from Fm 2555 .. | 4e. | <u> </u> |
| 5. Modified AGI for Roth IRA. Add lines 3, and 4a through 4e
Enter on line 5 above | 5. | <u>140,520</u> |

2025 FEDERAL DEPRECIATION SCHEDULE

ERIK E MORRIS & DANDAN SUI

File E # 1

Description	Date In Service	Method - Life	Cost	Prior Sec 179	Current Sec 179	Prior Sp Allow	Current Sp Allow	Basis	Prior Depr.	Current Depr.	Accum. Depr.	Adjusted Basis
*Office Chair	01/01/2022	200DBHY-7.	300					30	16	2	18	12
Toyota Prius	12/31/2022	SLHY-5.0	40000	962				9838	4920	1744	6664	3174

Subtotals:		40300	962			9868	4936	1746	6682	3186
2 ASSETS	Totals:	40300	962			9868	4936	1746	6682	3186

2025 FEDERAL DEPRECIATION SCHEDULE

ERIK E MORRIS & DANDAN SUI



1

Description	Date In Service	Method - Life	Cost	Prior Sec 179	Current Sec 179	Prior Sp Allow	Current Sp Allow	Basis	Prior Depr.	Current Depr.	Accum. Depr.	Adjusted Basis
Office Chair	01/01/2024	200DBHY-7.	300	225								
Network	01/01/2024	200DBHY-7.	983	737								

Subtotals: 1283 962

0

2 ASSETS Totals: 1283 962

2025 FEDERAL AMT DEPRECIATION SCHEDULE

ERIK E MORRIS & DANDAN SUI

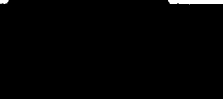
E # 1

Description	Date In Service	Method - Life	Cost	Prior Sec 179	Current Sec 179	Prior Sp Allow	Current Sp Allow	Basis	Prior Depr.	Current Depr.	Accum. Depr.	Adjusted Basis
*Office Chair	01/01/2022	150DBHY-7.	300					30	14	2	16	14
Toyota Prius	12/31/2022	SLHY-5	40000	962				9838	4920	1744	6664	3174

Subtotals:		40300	962			9868	4934	1746	6680	3188
2 ASSETS	Totals:	40300	962			9868	4934	1746	6680	3188

2025 FEDERAL AMT DEPRECIATION SCHEDULE

ERIK E MORRIS & DANDAN SUI



1

Description	Date In Service	Method - Life	Cost	Prior Sec 179	Current Sec 179	Prior Sp Allow	Current Sp Allow	Basis	Prior Depr.	Current Depr.	Accum. Depr.	Adjusted Basis
Office Chair	01/01/2024	150DBHY-7.	300	225								
Network	01/01/2024	150DBHY-7.	983	737								

Subtotals: 1283 962

0

2 ASSETS Totals: 1283 962

2026 CARRYFORWARD INFORMATION

ERIK E MORRIS & DANDAN SUI

Keep for Your Records

Itemized Returns Only – 2025 state and local tax refund (this amount will be proforma'd to

Taxable Refund Worksheet directly and may not be taxable in 2026)

Charitable contributions carryover to 2026	
Estimated short-term capital loss carryover	
Estimated long-term capital loss carryover	
2025 tax liability (for 2026 Form 2210 purposes)	11,928
Form 8839: 2025 carryover of unqualified expenses	
Refund amount applied to 2026	
Disallowed investment interest in 2025	
Additional state taxes paid	
Form 8396: Mortgage interest credit from 2023	
Mortgage interest credit from 2024	
Mortgage interest credit from 2025	
Form 8801: Minimum tax credit carryforward	0
Foreign Tax Credit carryforward to 2026	
General Business Credit carryforward to 2026	

Potential 2026 IRA contribution from 2025 tax refund

NOL carryforward:

Regular Tax

from 2005	from 2015
from 2006	from 2016
from 2007	from 2017
from 2008	from 2018
from 2009	from 2019
from 2010	from 2020
from 2011	from 2021
from 2012	from 2022
from 2013	from 2023
from 2014	from 2024
Gross NOL generated in 2025	*
To be absorbed in carryback period	
Net carryforward from 2025	*
Total carryforward to 2026	

AMT Tax

from 2005	from 2015
from 2006	from 2016
from 2007	from 2017
from 2008	from 2018
from 2009	from 2019
from 2010	from 2020
from 2011	from 2021
from 2012	from 2022
from 2013	from 2023
from 2014	from 2024
Gross AMT NOL generated in 2025	*
To be absorbed in carryback period	
Net carryforward from 2025	*
Total carryforward to 2026	

- Amounts from Schedule E (Pages 1 and/or 2) that are eligible for carryforward to the next tax year are reported on Form 8582. Any associated Alternative Minimum Tax (AMT) carryforward amounts are reflected on the AMT version of Form 8582.
- If there are Form(s) 6252 in this tax return, the gross profit ratio and prior payments received (including the current year payments) will carry forward from each Form 6252.
- Gross NOL generated in CY and Total carryforward to NY includes the excess business loss from Form 461, line 16.

SCHEDULE A LINE 5B

REAL ESTATE TAXES

NAME : ERIK E MORRIS & DANDAN SUI

DESCRIPTION	AMOUNT
Pennymac Loan Services	4,729
Rocket Mortgage	3,105
4219 Briarberry Lane Tampa FL 33624	7,729
1904 S 9th Street Haines City FL 33844	5,011
TOTAL	20,574

SCHEDULE A LINE 11

GIFTS BY CASH OR CHECK

NAME : ERIK E MORRIS & DANDAN SUI

DESCRIPTION	AMOUNT
The Ocean Cleanup	25
Give Kids the World	10
Team Seas	20
MDC Foundation	50
Charity Water	20
UN Foundation	2
Rays Baseball Foundation	20
STA Boosters	20
Tampa JCC	10
Volunteer Miles 347	49
TOTAL BEFORE LIMITATION	177
TOTAL GIFTS BY CASH OR CHECK AFTER LIMITATION	226

SCHEDULE A LINE 8A

HOME MORTGAGE INTEREST AND POINTS REPORTED ON FORM 1098

NAME : ERIK E MORRIS & DANDAN SUI

DESCRIPTION	AMOUNT
NAME : Pennymac Loan Services	10,011
Less: Percentage of Loan Proceeds	
DESCRIPTION	AMOUNT
NAME : Rocket Mortgage	5,146
Less: Percentage of Loan Proceeds	

Less: Loan used for other purposes

LESS: HOME MORTGAGE INTEREST CREDIT ON FORM 8396, LINE 3

-

TOTAL

15,157

SCHEDULE A LINE 16 ALLOWED GAMBLING LOSSES

NAME : ERIK E MORRIS & DANDAN SUI

DESCRIPTION	AMOUNT
ALLOWED GAMBLING LOSSES	25

D-400 (79) 9-8-25

Individual Income Tax Return 2025

< Staple All Pages of Your

North Carolina Department of Revenue

Return and W-2s Here

☐ Amended ReturnDOR
Use
Only

For calendar year 2025, or fiscal year beginning 25 and ending		Are you a veteran? Yes ☐ No ☒	
ERIK E MORRIS & DANDAN SUI 4219 BRIARBERRY LN TAMPA FL 33624 OUTF		Is your spouse a veteran? Yes ☐ No ☒	
Filing Status ☐ 1. Single ☒ 2. Married Filing Jointly ☐ 3. Married Filing Separately ☐ 4. Head of Household ☐ 5. Qualifying Widow(er)		Were you granted an automatic extension to file your 2025 federal income tax return, e.g., Form 1040? Yes ☐ No ☒	
Were you a resident of N.C. for the entire year? Yes ☐ No ☒		Year spouse died: _____	
Was your spouse a resident for the entire year? Yes ☐ No ☒		Return for deceased taxpayer. Date of death: _____	
		Return for deceased spouse. Date of death: _____	
N.C. Education Endowment Fund: You may contribute to the N.C. Education Endowment Fund by making a contribution or designating some or all of your overpayment to the Fund. To make a contribution, enclose Form NC-EDU and your payment of \$ 0. To designate your overpayment to the Fund, enter the amount of your designation on Page 2, Line 31. (See instructions for information about the Fund.)			
☐ Select box if you, or if married filing jointly, your spouse were out of the country on April 15, 2026, and a U.S. citizen or resident.			
☐ Select box if return is filed and signed by Executor, Administrator, or Court-Appointed Personal Representative.			

FS 2 PP N DT N OC N TPRES N SPRES N VT N SVT N

MORR 4219 33624 DS N EA N TD SD FDEXT N

ERIK E MORRIS OUTF

DANDAN SUI FL 33624

4219 BRIARBERRY LN TAMPA

06 140520 16 0 26C 0

07 0 18 Y 0 26E 0

09 0 20A 0 EU

10A 0 20B 1265 27 0

10B 0 21A 0 29 0

11 S Y I N 21B 0 30 0

11 25500 21C 0 31 0

13 02305 21D 0 32 0

14 26512 26A 0 34 138

15 1127 26B 0

TN 4077193887 PN PP

Sign Return Below ☒ Refund Due 138 ☐ Payment Due 0	
I declare and certify 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.	
☐ Check here if you authorize the North Carolina Department of Revenue to discuss this return and attachments with the paid preparer below.	
Your Signature _____ Date _____	Spouse's Signature (If filing joint return, both must sign.) _____ Date _____
Contact Phone No. (Include area code) 407 719 3887	
PAID PREPARER USE ONLY If prepared by a person other than taxpayer, this certification is based on all information of which the preparer has any knowledge.	
Paid Preparer's Signature _____ Date _____	Preparer's Contact Phone Number (Include area code) _____
Preparer's FEIN, SSN, or PTIN _____	
If REFUND, mail return to: N.C. DEPT. OF REVENUE, P.O. BOX R, RALEIGH, NC 27634-0001	
If you ARE NOT due a refund, mail return, any payment, and D-400V to: N.C. DEPT. OF REVENUE, P.O. BOX 25000, RALEIGH, NC 27640-0640	

Last Name (First 10 Characters) MORRIS

D-400 Line-by-Line Information

6.	Federal Adjusted Gross Income	6.	140520
7.	Additions to Federal Adjusted Gross Income	7.	0
8.	Add Lines 6 and 7	8.	140520
9.	Deductions From Federal Adjusted Gross Income	9.	0
10.	Child Deduction		
a.	Enter the number of qualifying children for whom you were allowed a federal child tax credit	10a.	0
b.	Enter the amount of the child deduction	10b.	0
11.	N.C. Standard Deduction	11.	Y
11.	N.C. Itemized Deduction	11.	N
11.	Deduction amount	11.	25500
12.	a. Add Lines 9, 10b, and 11	12a.	25500
	b. Subtract Line 12a from Line 8	12b.	115020
13.	Part-year Residents and Nonresidents Taxable Percentage	13.	0.2305
14.	N.C. Taxable Income	14.	26512
15.	N.C. Income Tax	15.	1127
16.	Tax Credits	16.	0
17.	Subtract Line 16 from Line 15	17.	1127
18.	Consumer Use Tax	18.	0
	You certify that no Consumer Use Tax is due		Y
19.	Add Lines 17 and 18	19.	1127

North Carolina Income Tax Withheld

20a.	Your tax withheld	20a.	0
20b.	Spouse's tax withheld	20b.	1265

Other Tax Payments

21a.	2025 estimated tax	21a.	0
21b.	Paid with extension	21b.	0
21c.	Partnership	21c.	0
21d.	S Corporation	21d.	0
22.	Additional Payments	22.	0
23.	Add Lines 20a through 22	23.	1265
24.	Previous Refunds	24.	0
25.	Subtract Line 24 from Line 23	25.	1265
26a.	Tax Due	26a.	0
26b.	Penalties	26b.	0
26c.	Interest	26c.	0
26d.	Add Lines 26b and 26c and enter the total on 26d	26d.	0
EU	Exception to Underpayment of Estimated Tax	EU	
26e.	Interest on the Underpayment of Estimated Income Tax	26e.	0
27.	Pay this Amount	27.	0
28.	Overpayment	28.	138

Amount of Refund to Apply to:

29.	Amount of Line 28 to be applied to 2026 Estimated Income Tax	29.	0
30.	N.C. Nongame and Endangered Wildlife Fund	30.	0
31.	N.C. Education Endowment Fund	31.	0
32.	N.C. Breast and Cervical Cancer Control Program	32.	0
33.	Add Lines 29 through 32	33.	0
34.	Amount to be Refunded	34.	138

This page must be filed with the first page of this form.

D-400 Sch PN (79)

9-8-25

2025 Part-Year Resident and
Nonresident Schedule

North Carolina Department of Revenue

DOR
Use
Only

If you enter a taxable percentage on Form D-400, Line 13 because you or your spouse, if married filing jointly, were not full-year residents of North Carolina during tax year 2025, you must attach this schedule to Form D-400. Importantly, you must attach both pages of this schedule to Form D-400. If you do not, the Department may be unable to process your return.

Last Name (First 10 Characters) Morris

A part-year resident or a nonresident who receives income from N.C. sources must complete this form to determine the percentage of total income from all sources that is subject to N.C. tax. You are a **"part-year resident"** if you moved to N.C. and became a resident during the tax year, or you moved out of N.C. and became a resident of another state during the tax year. You are a **"nonresident"** if you were not a resident of N.C. at any time during the tax year.

Important: Refer to the Instructions before completing this form.

NRT Y PYT N 22 32466
NRS N PYS Y 01 01 25 07 24 25 23 140820

Part A. Residency Status

Taxpayer is: (Select applicable box)

☐ Full-Year Resident ☒ Nonresident ☐ Part-Year Resident
Date N.C. residency began Date N.C. residency ended

Spouse is: (Select applicable box)

☐ Full-Year Resident ☐ Nonresident ☒ Part-Year Resident
Date N.C. residency began Date N.C. residency ended
01 01 25 07 24 25

If you and your spouse were both full-year residents of N.C., stop here; do not complete Parts B and C. Do not attach Schedule PN to Form D-400.

Part B. Allocation of Income for Part-Year Residents and Nonresidents

Total Income		COLUMN A Total Income from all Sources	COLUMN B Amount of Column A Attributable to N.C.
1. Wages, Salaries, Tips, Etc.		1. 134225	32466
2. Taxable Interest		2. 671	0
3. Taxable Dividends		3. 1498	0
4. Taxable Refunds, Credits, or Offsets of State and Local Income Taxes		4. 0	0
5. Alimony Received		5. 0	0
6. Business Income or (Loss)		6. 0	0
7. Capital Gain or (Loss)		7. -322	0
8. Other Gains or (Losses)		8. 0	0
9. Taxable Amount of IRA Distributions		9. 0	0
10. Taxable Amount of Pensions and Annuities		10. 0	0
11. Rental Real Estate, Royalties, Partnerships, S-Corps, Estates, Trusts, Etc.		11. 4460	0
12. Farm Income or (Loss)		12. 0	0
13. Unemployment Compensation		13. 0	0
14. Taxable Portion of Social Security and Railroad Retirement Benefits		14. 0	0
15. Other Income		15. 288	0
16. Total Income		16. 140820	32466

7020979027

North Carolina Adjustments

	COLUMN A Amount from Form D-400 Schedule S	COLUMN B Amount of Column A Attributable to N.C.
17. Additions		
a. Interest Income From Obligations of States Other Than N.C.	17a. 0	0
b. Deferred Gains Reinvested Into an Opportunity Fund	17b. 0	0
c. Bonus Depreciation	17c. 0	0
d. IRC Section 179 Expense	17d. 0	0
e. Other Additions to Federal Adjusted Gross Income That Relate to Gross Income	17e. 0	0
18. Total Additions	18. 0	0

Last Name (First 10 Characters) Morris

Your Social Security Number

Part B. Allocation of Income for Part-Year Residents and Nonresidents (continued)

		COLUMN A Amount from Form D-400 Schedule S	COLUMN B Amount of Column A Attributable to N.C.
19.	Deductions		
a.	State or Local Income Tax Refund	19a. 0	0
b.	Interest Income From Obligations of the United States or United States' Possessions	19b. 0	0
c.	Taxable Portion of Social Security and Railroad Retirement Benefits	19c. 0	0
d.	Retirement Benefits Received by Vested N.C. State Government, N.C. Local Government, or Federal Government Retirees, i.e. <i>Bailey Settlement</i>	19d. 0	0
e.	Bonus Asset Basis	19e. 0	0
f.	Bonus Depreciation	19f. 0	0
g.	IRC Section 179 Expense	19g. 0	0
h.	Other Deductions From Federal Adjusted Gross Income That Relate to Gross Income	19h. 0	0
20.	Total Deductions	20. 0	0
21.	Total Income Modified by N.C. Adjustments	21. 140820	32466

Part C. Part-Year Residents and Nonresidents Taxable Percentage

22.	Enter the Amount From Column B, Line 21	22. 32466
23.	Enter the Amount From Column A, Line 21	23. 140820
24.	Part-Year Residents and Nonresident Taxable Percentage	24. 0.2305