

For the year Jan. 1-Dec. 31, 2023, or other tax year beginning . . . , 2023, ending . . . , 20 . . . See separate instructions.

Your first name and middle initial: Jeremy L. Last name: Lee. Your social security number: 9 6 7 6. Spouse's social security number: . . .

Home address (number and street): . . . Apt. no.: . . . City, town, or post office: . . . State: . . . ZIP code: . . . Foreign country name: . . . Foreign province/state/county: . . . Foreign postal code: . . . Presidential Election Campaign: . . .

Filing Status: [] Single [] Head of household (HOH) [] Married filing jointly (even if only one had income) [] Qualifying surviving spouse (QSS) [x] Married filing separately (MFS)

Digital Assets: At any time during 2023, 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)? [] Yes [x] No

Standard Deduction: Someone can claim: [] You as a dependent [] Your spouse as a dependent [] Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness: You: [] Were born before January 2, 1959 [] Are blind Spouse: [] Was born before January 2, 1959 [] Is blind

Table with 6 columns: (1) First name, Last name, (2) Social security number, (3) Relationship to you, (4) Child tax credit, Credit for other dependents. Includes rows for dependents.

Income section table with columns for line numbers and amounts. Rows include 1a-1z, 2a-2b, 3a-3b, 4a-4b, 5a-5b, 6a-6b, 7, 8, 9, 10, 11, 12, 13, 14, 15.

Standard Deduction for - Single or Married filing separately, \$13,850. Married filing jointly or Qualifying surviving spouse, \$27,700. Head of household, \$20,800. If you checked any box under Standard Deduction, see instructions.

Tax and Credits	16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	16	0.00
	17	Amount from Schedule 2, line 3	17	0.00
	18	Add lines 16 and 17	18	0.00
	19	Child tax credit or credit for other dependents from Schedule 8812	19	0.00
	20	Amount from Schedule 3, line 8	20	0.00
	21	Add lines 19 and 20	21	0.00
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	0.00
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	0.00
	24	Add lines 22 and 23. This is your total tax	24	0.00

Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2	25a	7247.33
	b	Form(s) 1099	25b	0.00
	c	Other forms (see instructions)	25c	0.00
	d	Add lines 25a through 25c	25d	7247.33
	26	2023 estimated tax payments and amount applied from 2022 return	26	
	27	Earned income credit (EIC)	27	0.00
	28	Additional child tax credit from Schedule 8812	28	0.00
	29	American opportunity credit from Form 8863, line 8	29	0.00
	30	Reserved for future use	30	
	31	Amount from Schedule 3, line 15	31	0.00
	32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32	0.00
	33	Add lines 25d, 26, and 32. These are your total payments	33	7247.33

Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	7247.33
	35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	35a	7247.33
Direct deposit? See instructions.	b	Routing number	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
	d	Account number		
	36	Amount of line 34 you want applied to your 2024 estimated tax	36	0.00

Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to www.irs.gov/Payments or see instructions.	37	0.00
	38	Estimated tax penalty (see instructions)	38	0.00

Third Party Designee Do you want to allow another person to discuss this return with the IRS? See instructions Yes. Complete below. No

Designee's name _____ Phone no. _____ Personal identification number (PIN) _____

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature: *Jeremy Lee* Date: 3/12/24 Your occupation: Private-sector software developer

Spouse's signature: _____ Date: _____ Spouse's occupation: _____

Phone no. _____ Email address _____

Paid Preparer Use Only

Preparer's name _____ Preparer's signature _____ Date _____ PTIN _____ Check if: Self-employed

Firm's name _____ Phone no. _____

Firm's address _____ Firm's EIN _____

Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

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

▶ Go to www.irs.gov/Form4852 for the latest information.

Attachment
Sequence No. 04

You must take the following steps before filing Form 4852

- Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.
- If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you to file with your return.

1 Name(s) shown on return Jeremy L. Lee	2 Your social security number [REDACTED]-9676
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3 Address
[REDACTED]

4 Enter year in space provided and check one box. For the tax year ending December 31, _____, I have been unable to obtain (or have received an incorrect) Form W-2 **OR** Form 1099-R.
I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address, and ZIP code [REDACTED]	6 Employer's or payer's TIN (if known) [REDACTED]
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7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	0.00	f State income tax withheld	0.00
b Social security wages	0.00	(Name of state)	
c Medicare wages and tips	0.00	g Local income tax withheld	0.00
d Social security tips	0.00	(Name of locality)	
e Federal income tax withheld	0.00	h Social security tax withheld	5873.65
		i Medicare tax withheld	1373.68

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

a Gross distribution		f Federal income tax withheld	
b Taxable amount		g State income tax withheld	
c Taxable amount not determined	<input type="checkbox"/>	(Name of state)	
d Total distribution	<input type="checkbox"/>	h Local income tax withheld	
e Capital gain (included on line 8b)		(Name of locality)	
		i Employee contributions	
		j Distribution codes	

9 How did you determine the amounts on lines 7 and 8 above?
I took the wages & tip amounts by applying the legal definitions of "tips" & "wages". For "Soc. Sec. Tax Withheld", I added up the social security tax withheld from each paycheck. Lastly, for "Medicare tax withheld", I added the Medicare tax withheld from each paycheck.

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.
After discovering that my payer had incorrectly classified my non-federally-privileged (and thus non-taxable) earnings as "wages" via a W-2, I corrected certain amounts on that W-2 with this Form 4852, thereby setting the record straight and setting up my full refund.

General Instructions

Section references are to the Internal Revenue Code.

Future developments. For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to www.irs.gov/Form4852.

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R (original or corrected) and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R, or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return before any supporting forms or schedules.

You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.