Form 1040 — U.S. Individual Income Tax Return

Department of the Treasury—Internal Revenue Service | 2023 | OMB No. 1545-0074 | IRS Use Only—Do not write or staple in this space.

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	Last name	Your social security number
JACQUES	BOUDIN	
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
MARGARET	BOUDIN	

Home address (number and street). If you have a P.O. box, see instructions. — Apt. no.

City, town, or post office. If you have a foreign address, also complete spaces below. — State: FL — ZIP code: 34135

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

Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse

Filing Status (Check only one box.)
☐ Single ☐ Head of household (HOH)
☑ Married filing jointly (even if only one had income)
☐ Married filing separately (MFS) ☐ Qualifying surviving spouse (QSS)
If you checked the MFS box, enter the name of your spouse. 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 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)? (See instructions.) ☐ Yes ☑ No

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

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

Dependents (see instructions):

(1) First name Last name	(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions): Child tax credit	Credit for other dependents
			☐	☐
			☐	☐
			☐	☐
			☐	☐

If more than four dependents, see instructions and check here . . ☐

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

If you did not get a Form W-2, see instructions.

1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	0
b	Household employee wages not reported on Form(s) W-2	1b	0
c	Tip income not reported on line 1a (see instructions)	1c	0
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	0
e	Taxable dependent care benefits from Form 2441, line 26	1e	0
f	Employer-provided adoption benefits from Form 8839, line 29	1f	0
g	Wages from Form 8919, line 6	1g	0
h	Other earned income (see instructions)	1h	0
i	Nontaxable combat pay election (see instructions) 1i 0		
z	Add lines 1a through 1h	1z	0

Attach Sch. B if required.

2a	Tax-exempt interest 2a		b Taxable interest	2b	36929
3a	Qualified dividends 3a		b Ordinary dividends	3b	0
4a	IRA distributions 4a		b Taxable amount	4b	0
5a	Pensions and annuities 5a		b Taxable amount	5b	0
6a	Social security benefits 6a	68150	b Taxable amount	6b	68150

c	If you elect to use the lump-sum election method, check here (see instructions) ☐		
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☑	7	0
8	Additional income from Schedule 1, line 10	8	0
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income**	9	105079
10	Adjustments to income from Schedule 1, line 26	10	0
11	Subtract line 10 from line 9. This is your **adjusted gross income**	11	105079
12	**Standard deduction or itemized deductions** (from Schedule A)	12	27700
13	Qualified business income deduction from Form 8995 or Form 8995-A	13	0
14	Add lines 12 and 13	14	27700
15	Subtract line 14 from line 11. If zero or less, enter -0-. *This is your* ***taxable income***	15	77379

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 ☐ 8814 2 ☐ 4972 3 ☐		16	8845
	17	Amount from Schedule 2, line 3		17	0
	18	Add lines 16 and 17		18	0
	19	Child tax credit or credit for other dependents from Schedule 8812		19	0
	20	Amount from Schedule 3, line 8		20	0
	21	Add lines 19 and 20		21	0
	22	Subtract line 21 from line 18. If zero or less, enter -0-		22	0
	23	Other taxes, including self-employment tax, from Schedule 2, line 21		23	0
	24	Add lines 22 and 23. This is your **total tax**		24	8845
Payments	25	Federal income tax withheld from:			
	a	Form(s) W-2	25a 0		
	b	Form(s) 1099	25b 17857		
	c	Other forms (see instructions)	25c 0		
	d	Add lines 25a through 25c		25d	17857
If you have a qualifying child, attach Sch. EIC.	26	2023 estimated tax payments and amount applied from 2022 return		26	0
	27	Earned income credit (EIC)	27		
	28	Additional child tax credit from Schedule 8812	28		
	29	American opportunity credit from Form 8863, line 8	29		
	30	Reserved for future use	30		
	31	Amount from Schedule 3, line 15	31		
	32	Add lines 27, 28, 29, and 31. These are your **total other payments and refundable credits**		32	0
	33	Add lines 25d, 26, and 32. These are your **total payments**		33	17857
Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid**		34	9012
	35a	Amount of line 34 you want **refunded to you.** If Form 8888 is attached, check here ☐		35a	9012
Direct deposit? See instructions.	b	Routing number	c Type: ☐ Checking ☐ Savings		
	d	Account number			
	36	Amount of line 34 you want **applied to your 2024 estimated tax**	36		
Amount You Owe	37	Subtract line 33 from line 24. This is the **amount you owe.** For details on how to pay, go to *www.irs.gov/Payments* or see instructions		37	0
	38	Estimated tax penalty (see instructions)	38		

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

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

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

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
James Bourdin	2-16-24	RETIRED	
Spouse's signature. If a joint return, both must sign.	**Date**	**Spouse's occupation**	**If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)**
Margaret Bourdin	2-16-24	RETIRED	
Phone no.	Email address		

Joint return? See instructions. Keep a copy for your records.

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	

Form **4852**
(Rev. September 2020)
Department of the Treasury
Internal Revenue Service

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.

▶ Attach to Form 1040, 1040-SR, or 1040-X.
▶ Go to *www.irs.gov/Form4852* for the latest information.

OMB No. 1545-0074
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	2 Your social security number
Jacques Boudin	

3 Address
[redacted], stero, FL 34135

4 **Enter year in space provided and check one box.** For the tax year ending December 31, 2023,
I have been unable to obtain (or have received an incorrect) ☐ Form W-2 **OR** ☑ Form 1099-R.
I have ~~notified~~ HEREBY NOTIFY 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	6 Employer's or payer's TIN (if known)
Lincoln Natl Life Ins Co., P.O. Box 1110, Fort Wayne, IN 46801	35-0472300

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	3,144	f Federal income tax withheld	314
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		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?
The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.
None

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.

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1 Name(s) shown on return	2 Your social security number
Jacques Boudin	

3 Address

, Estero, FL 34135

4 **Enter year in space provided and check one box.** For the tax year ending December 31, 2023 ,

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.

Hereby Notify

5 Employer's or payer's name, address, and ZIP code	6 Employer's or payer's TIN (if known)
Lincoln Natl Life Ins Co., P.O. Box 1110, Fort Wayne, IN 46801	35-0472300

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	15721	f Federal income tax withheld	1572
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined	☐	(Name of state)	
d Total distribution	☐	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?

The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.

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Margaret Boudin	

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Lincoln Natl Life Ins Co., P.O. Box 1110, Fort Wayne, IN 46801	35-0472300

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	1392	f Federal income tax withheld	139
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		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?
The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401(a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.
None

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Margaret Boudin	

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Lincoln Natl Life Ins Co., P.O. Box 1110, Fort Wayne, IN 46801	35-0472300

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	6,960	f Federal income tax withheld	696
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined	☐	(Name of state)	
d Total distribution	☐	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?
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Jacques Boudin	[redacted]

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5 Employer's or payer's name, address, and ZIP code	6 Employer's or payer's TIN (if known)
Pruco Lefe Insurance Co., P.O. Box 13467, Philadelphia, PA 19176	22-1944557

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	6,821	f Federal income tax withheld	682
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		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?

The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.

None

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.

Form **4852**
(Rev. September 2020)
Department of the Treasury
Internal Revenue Service

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.

▶ Attach to Form 1040, 1040-SR, or 1040-X.
▶ Go to *www.irs.gov/Form4852* for the latest information.

OMB No. 1545-0074
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	2 Your social security number
Margaret Boudin	[redacted]

3 Address
[redacted] Estero, FL 34135

4 **Enter year in space provided and check one box.** For the tax year ending December 31, 2023,
I have been unable to obtain (or have received an incorrect) ☐ Form W-2 **OR** ☑ Form 1099-R.
I have HEREBY NOTIFY 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	6 Employer's or payer's TIN (if known)
Pruco Life Insurance Co., P.O. Box 13467, Philadelphia, PA 19176	22-1944557

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	3,432	f Federal income tax withheld	342
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		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?
The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.
None

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.

Form **4852** (Rev. September 2020)

Department of the Treasury
Internal Revenue Service

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.

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

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

OMB No. 1545-0074

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	2 Your social security number
Jacques Boudin	

3 Address

, Estero, FL 34135

4 **Enter year in space provided and check one box.** For the tax year ending December 31, 2023 ,

I have been unable to obtain (or have received an incorrect) ☐ Form W-2 **OR** ☑ Form 1099-R.

I have HEREBY NOTIFY 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	6 Employer's or payer's TIN (if known)
Fidelity Investments, Institutional Operations Co.,100 Maellan Way KW1C, Covington, KY 41015	04-6568107

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	3,337	f Federal income tax withheld	0
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		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?

The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.

None

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.

Form **4852** (Rev. September 2020)

Department of the Treasury
Internal Revenue Service

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.

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

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

OMB No. 1545-0074

Attachment Sequence No. 04

You must take the following steps before filing Form 4852

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1 Name(s) shown on return	2 Your social security number
Jacques Boudin	

3 Address

[redacted], Estero, FL 34135

4 **Enter year in space provided and check one box.** For the tax year ending December 31, 2023,

I have been unable to obtain (or have received an incorrect) ☐ Form W-2 **OR** ☑ Form 1099-R.

I have ~~notified~~ HEREBY NOTIFY 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	6 Employer's or payer's TIN (if known)
National Financial Services, LLC, P.O. Box 28019, Albuquerque, NM 87125	04-3523567

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	18,200	f Federal income tax withheld	0
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		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?

The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.

None

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.

Form **4852** (Rev. September 2020)

Department of the Treasury
Internal Revenue Service

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.

▶ Attach to Form 1040, 1040-SR, or 1040-X.
▶ Go to *www.irs.gov/Form4852* for the latest information.

OMB No. 1545-0074

Attachment Sequence No. 04

You must take the following steps before filing Form 4852

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1 Name(s) shown on return	2 Your social security number
Margaret Boudin	[redacted]

3 Address

[redacted]e, Estero, FL 34135

4 **Enter year in space provided and check one box.** For the tax year ending December 31, 2023 ,
I have been unable to obtain (or have received an incorrect) ☐ Form W-2 **OR** ☑ Form 1099-R.
I have ~~notified~~ Hegedy notify 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	6 Employer's or payer's TIN (if known)
Commonwealth of Pennsylvania, Public School Employees' Retirement System, 5 North 5th Street, Harrisburg, PA 17101	23-1739115

7 **Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

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

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

a Gross distribution	3,0630	f Federal income tax withheld	0
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined ☐		(Name of state)	
d Total distribution ☐		h Local income tax withheld	0
e Capital gain (included on line 8b)	0	(Name of locality)	
		i Employee contributions	0
		j Distribution codes	

9 How did you determine the amounts on lines 7 and 8 above?
The Company named on line 5 provided a 1099-R which erroneously reported distributions as taxable which I hereby rebut as being instead delayed payments of earnings from non-federally related activities nor related to a federal office per IRC section 3401a) and 3121(a).

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.
None

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.

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This corrected 1099-INT form is submitted to rebut a document known to have been transmitted to the IRS by the entity identified below as PAYER, erroneously alleging payment to the party identified below as RECIPIENT of "gains, profits or income" made in the course of conducting transactions as a "Federal Instrumentality".

No payments were received by RECIPIENT as reported by PAYER in connection with a "federal Instrumentality" or any federally connected privleged taxable activity that would constitute income under relevant tax law.

Under penalties of perjury, I declare that I have examined this statement and to the best of my knowledge and belief it is true, correct and complete.

Margaret Boudin

Margaret Boudin

2-2-2024

Date

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.	Payer's RTN (optional)	OMB No. 1545-0112	**Interest Income**
Achieva Credit Union 1659 Achieva Way Dunedin, FL 34698 727-431-7680	1 Interest income $ 0	Form 1099-INT (Rev. January 2022)	
	2 Early withdrawal penalty $ 0.00	For calendar year 2023	
	3 Interest on U.S. Savings Bonds and Treasury obligations $ 0.00		**Copy B** **For Recipient**
PAYER'S TIN: 59-0729366 / RECIPIENT'S TIN: XXX-XX	4 Federal income tax withheld $ 0.00	5 Investment expenses $	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
RECIPIENT'S name, Street address (including apt. no.), City or town, state or province, country, and ZIP or foreign postal code MARGARET BOUDIN ESTERO FL 3413[illegible]	6 Foreign tax paid $	7 Foreign country or U.S. possession	
	8 Tax-exempt interest $	9 Specified private activity bond interest $	
	10 Market discount $	11 Bond premium $	
FATCA filing requirement ☐	12 Bond premium on Treasury obligations $	13 Bond premium on tax-exempt bond $	
Account number (see instructions) 0002105588	14 Tax-exempt and tax credit bond CUSIP no.	15 State	16 State identification no. / 17 State tax withheld $ $

Form **1099-INT** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099INT Department of the Treasury - Internal Revenue Service

This corrected 1099-INT form is submitted to rebut a document known to have been transmitted to the IRS by the entity identified below as PAYER, erroneously alleging payment to the party identified below as RECIPIENT of "gains, profits or income" made in the course of conducting transactions as a "Federal Instrumentality".

No payments were received by RECIPIENT as reported by PAYER in connection with a "federal instrumentality" or any federally connected privileged taxable activity that would constitute income under relevant tax law.

Under penalties of perjury, I declare that I have examined this statement and to the best of my knowledge and belief it is true, correct and complete.

Margaret Boudin

Margaret Boudin

2-2-2024

Date

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. (215) 612-5900 FREEDOM CREDIT UNION 626 JACKSONVILLE ROAD SUITE 250 WARMINSTER PA 18974-4862	Payer's RTN (optional) 236084751 1 Interest income $ 0 2 Early withdrawal penalty $	OMB No. 1545-0112 Form **1099-INT** (Rev. January 2024) For calendar year 2023	**Interest Income**
PAYER'S TIN 23-2403099	RECIPIENT'S TIN XXX-XX	3 Interest on U.S. Savings Bonds and Treasury obligations $	**Copy B For Recipient** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code BOUDIN MARGARET A ESTERO FL 34135		4 Federal income tax withheld $ 5 Investment expenses $ 6 Foreign tax paid $ 7 Foreign country or U.S. possession 8 Tax-exempt interest $ 9 Specified private activity bond interest $ 10 Market discount $ 11 Bond premium $	
FATCA filing requirement ☐		12 Bond premium on Treasury obligations $ 13 Bond premium on tax-exempt bond $	
Account number (see instructions) XXXXXX8780		14 Tax-exempt and tax credit bond CUSIP no. 15 State 16 State identification no. 17 State tax withheld $	

Form **1099-INT** (Rev. 1-2024) (keep for your records) www.irs.gov/Form1099INT Department of the Treasury - Internal Revenue Service

This corrected 1099-INT form is submitted to rebut a document known to have been transmitted to the IRS by the entity identified below as PAYER, erroneously alleging payment to the party identified below as RECIPIENT of "gains, profits or income" made in the course of conducting transactions as a "Federal Instrumentality".

No payments were received by RECIPIENT as reported by PAYER in connection with a "federal Instrumentality" or any federally connected privileged taxable activity that would constitute income under relevant tax law.

Under penalties of perjury, I declare that I have examined this statement and to the best of my knowledge and belief it is true, correct and complete.

Margaret Boudin — Date: 2-13-2024

Jacques Boudin — Date: 2/13/2024

COMMONWEALTH FINANCIAL NETWORK
29 SAWYER ROAD
WALTHAM, MA 02453-3483

2023 TAX REPORTING STATEMENT

MARGARET A BOUDIN

Account No.
Recipient ID No.

Customer Service: 215-579-4941
Payer's Fed ID Number: 04-3523567

eDelivered

MARGARET A BOUDIN
JACQUES BOUDIN
[redacted]
ESTERO FL 34135

Payer's Name and Address:
NATIONAL FINANCIAL SERVICES LLC
499 WASHINGTON BLVD
JERSEY CITY, NJ 07310

Form 1099-INT *

2023 Interest Income

Copy B for Recipient
(OMB No. 1545-0112)

1	Interest Income	10	Market Discount 0.00
2	Early Withdrawal Penalty 0.00	11	Bond Premium 0.00
3	Interest on U.S. Savings Bonds and Treas. Obligations 0.00	12	Bond Premium on U.S. Treasury Obligations 0.00
4	Federal Income Tax Withheld 0.00	13	Bond Premium on Tax-Exempt Bond 0.00
5	Investment Expenses	14	Tax-Exempt Bond CUSIP no.
6	Foreign Tax Paid 0.00	15	State
7	Foreign Country or U.S. Possession	16	State Identification No
8	Tax-Exempt Interest 0.00	17	State Tax Withheld 0.00
9	Specified Private Activity Bond Interest 0.00		

* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

01/15/2024 9066000000

This corrected 1099-DIV form is submitted to rebut a document known to have been transmitted to the IRS by the entity identified below as PAYER, erroneously alleging payment to the party identified below as RECIPIENT of "gains, profits or income" made in the course of conducting transactions as a "Federal Instrumentality".

No payments were received by RECIPIENT as reported by PAYER in connection with a "federal instrumentality" or any federally connected privileged taxable activity that would constitute income under relevant tax law.

Under penalties of perjury, I declare that I have examined this statement and to the best of my knowledge and belief it is true, correct and complete.

Margaret Boudin — 2-13-2024

Margaret Boudin — Date

Jacques Boudin — 2/13/2024

Jacques Boudin — Date

COMMONWEALTH FINANCIAL NETWORK
29 SAWYER ROAD
WALTHAM, MA 02453-3483

2023 TAX REPORTING STATEMENT

MARGARET A BOUDIN

Account No. [redacted] Customer Service: 215-579-4941
Recipient ID No. [redacted] Payer's Fed ID Number: 04-3523567

eDelivered

MARGARET A BOUDIN
JACQUES BOUDIN
ESTERO FL 3413[redacted]

Payer's Name and Address:
NATIONAL FINANCIAL SERVICES LLC
499 WASHINGTON BLVD
JERSEY CITY, NJ 07310

Form 1099-DIV* — 2023 Dividends and Distributions — Copy B For Recipient (OMB No. 1545-0110)

1a Total Ordinary Dividends	[redacted]	5 Investment Expenses	0.00
1b Qualified Dividends	[redacted]	7 Foreign Tax Paid	0.00
2a Total Capital Gain Distributions	0.00	8 Foreign Country or U.S. Possession	
2b Unrecap. Sec 1250 Gain	0.00	9 Cash Liquidation Distributions	0.00
2c Section 1202 Gain	0.00	10 Non-Cash Liquidation Distributions	0.00
2d Collectibles (28%) Gain	0.00	12 Exempt Interest Dividends	0.00
2e Section 897 Ordinary Dividends	0.00	13 Specified Private Activity Bond Interest Dividends	0.00
2f Section 897 Capital Gain	0.00	14 State	
3 Nondividend Distributions	0.00	15 State Identification No.	
4 Federal Income Tax Withheld	0.00	16 State Tax Withheld	0.00
6 Section 199A Dividends	0.00		

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2023 • PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
• SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name	Box 2. Beneficiary's Social Security Number
JACQUES BOUDIN	

Box 3. Benefits Paid in 2023	Box 4. Benefits Repaid to SSA in 2023	Box 5. Net Benefits for 2023 *(Box 3 minus Box 4)*
$40,999.20	NONE	$40,999.20

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or Direct deposit	$26,360.40
Medicare Part B premiums deducted from your benefits	$5,143.20
Medicare Prescription Drug premiums (Part D) deducted from your benefits	$709.20
Voluntary Federal Income Tax Withheld	$8,786.40
Total Additions	$40,999.20
Benefits for 2023	$40,999.20

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

$8,786.40

Box 7. Address

JACQUES BOUDIN

ESTERO FL 34135-8441

Box 8. Claim Number (*Use this number if you need to contact SSA.*)

Form **SSA-1099-SM** (1-2024) **DO NOT RETURN THIS FORM TO SSA OR IRS**

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2023 • PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
• SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name	Box 2. Beneficiary's Social Security Number
MARGARET A BOUDIN	

Box 3. Benefits Paid in 2023	Box 4. Benefits Repaid to SSA in 2023	Box 5. Net Benefits for 2023 *(Box 3 minus Box 4)*
$27,151.20	NONE	$27,151.20

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or Direct deposit	$15,974.40
Medicare Part B premiums deducted from your benefits	$5,143.20
Medicare Prescription Drug premiums (Part D) deducted from your benefits	$709.20
Voluntary Federal Income Tax Withheld	$5,324.40
Total Additions	$27,151.20
Benefits for 2023	$27,151.20

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

$5,324.40

Box 7. Address

MARGARET A BOUDIN

ESTERO FL 34135-8441

Box 8. Claim Number (*Use this number if you need to contact SSA.*)

Form **SSA-1099-SM** (1-2024) **DO NOT RETURN THIS FORM TO SSA OR IRS**