

CONFIDENTIAL

Escambia County-Elected Constitutional Officer

FOR OFFICE USE ONLY:

FLORIDA
COMMISSION ON ETHICS

JUN 08 2020

RECEIVED

*****AUTO**ALL FOR AADC 325 T3 P2 58 564

HON THELBERT DAVID MORGAN, SHERIFF
PO BOX 18770
1700 W LEONARD ST
PENSACOLA FL 32501-1122

PROCESSED

ID CODE



ID NO.

226091

CONF. CODE C

Morgan, Theibert David

CHECK IF THIS IS A FILING BY A CANDIDATE

PART A -- NET WORTH

Please enter the value of your net worth as of December 31, 2019 or a more current date. [Note: Net worth is not calculated by subtracting your reported liabilities from your reported assets, so please see the instructions on page 3.]

My net worth as of May 30, 2020 was \$ 1,686,023.00

PART B -- ASSETS

HOUSEHOLD GOODS AND PERSONAL EFFECTS:

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, whether owned or leased.

The aggregate value of my household goods and personal effects (described above) is \$ 215,000.00

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
Private Residence, [REDACTED]	\$332,961.00
2804 Denby St, Pensacola FL 32506	44,569.00
5051 Grande Dr, Unit #D-3, Pensacola FL 32503	131,568.00
5051 Grande Dr, Unit #E-7, Pensacola FL 32503	128,924.00

PART C -- LIABILITIES

LIABILITIES IN EXCESS OF \$1,000 (See instructions on page 4):

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
<u>None</u>	<u>Ø</u>

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
<u>None</u>	<u>Ø</u>

PART D -- INCOME

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2019 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

I elect to file a copy of my 2019 federal income tax return and all W2's, schedules, and attachments.
 [If you check this box and attach a copy of your 2019 tax return, you need not complete the remainder of Part D.]

PRIMARY SOURCES OF INCOME (See instructions on page 5):

NAME OF SOURCE OF INCOME EXCEEDING \$1,000	ADDRESS OF SOURCE OF INCOME	AMOUNT
N/A		

SECONDARY SOURCES OF INCOME [Major customers, clients, etc., of businesses owned by reporting person--see instructions on page 5]:

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCE(S) OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE
N/A			

PART E -- INTERESTS IN SPECIFIED BUSINESSES [Instructions on page 6]

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY	None		
ADDRESS OF BUSINESS ENTITY			
PRINCIPAL BUSINESS ACTIVITY			
POSITION HELD WITH ENTITY			
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

PART F - TRAINING

For officers required to complete annual ethics training pursuant to section 112.3142, F.S.

I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.

OATH

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed on this form and any attachments hereto is true, accurate, and complete.

STATE OF FLORIDA

COUNTY OF Escambia

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this 27th day of

May, 20 20 by Thelbert David Morgan

Carissa Mitchell
 (Signature of Notary Public--State of Florida)



CARISSA MITCHELL
 Commission # GG 972202
 Expires April 1, 2024
 Bonded thru Budget Notary Services

(Print, Type, or Stamp Commissioned Name of Notary Public)

Personally Known OR Produced Identification

Type of Identification Produced _____

[Signature]
 SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, N/A, prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

N/A
 Signature

N/A
 Date

Preparation of this form by a CPA or attorney does not relieve the filer of the responsibility to sign the form under oath.

IF ANY OF PARTS A THROUGH E ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE

PART B – ASSETS (cont) NAME: Thelbert David Morgan #226091 (2019 filing)

5051 Grande Dr., Unit #G-4, Pns, FL 32503 (investment property)	\$ 114,743.00
5051 Grande Dr., Unit #H-1, Pns, FL 32503 (“ ”)	\$ 119,582.00
5051 Grande Dr., Unit #L-3, Pns FL 32503 (“ ”)	\$126,809.00
5051 Grande Dr., Unit-#L-5, Pns FL 32503 (“ ”)	\$124,867.00

Money Market Savings \$ 340,000.00

Eglin Federal Credit Union
838 Eglin Pkwy, N.E.
Ft. Walton Beach, FL 32547-3935

USPA IRA \$ 7,000.00

Business Equipment (computer, bookshelves, etc.) \$ 2,000.00

Filing Status Single Married filing jointly Married filing separately (MFS)
 Head of household (HOH) Qualifying widow(er) (QW)
 Check only one box. If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial THELBERT D	Last name MORGAN	Your social security number [REDACTED]
If joint return, spouse's first name and middle initial [REDACTED]	Last name MORGAN	Spouse's social security number [REDACTED]
Home address (number and street). If you have a P.O. box, see instructions. [REDACTED]		Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). [REDACTED]		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 <input type="checkbox"/> You <input type="checkbox"/> Spouse
Foreign country name	Foreign province/state/county	Foreign postal code
If more than four dependents, see inst. & check here ▶ <input type="checkbox"/>		

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, 1955 Are blind
 Spouse: Was born before January 2, 1955 Is blind

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

Standard Deduction • Single or Married filing separately, \$12,200 • Married filing jointly or Qualifying widow(er), \$24,400 • Head of household, \$18,350 • If you checked any box under Standard Deduction, see instructions.	1 Wages, salaries, tips, etc. Attach Form(s) W-2	1	154,153
	2a Tax-exempt interest	2a	
	3a Qualified dividends	3a	
	4a IRA distributions	4a	
	c Pensions and annuities	4c	
	5a Social security benefits	5a	44,559
	6 Capital gain or (loss). Attach Schedule D if required. If not required, check here . . ▶ <input type="checkbox"/>	6	
	7a Other income from Schedule 1, line 9	7a	11,406
	b Add lines 1, 2b, 3b, 4b, 4d, 5b, 6, and 7a. This is your total income ▶	7b	315,553
	8a Adjustments to income from Schedule 1, line 22	8a	0
	b Subtract line 8a from line 7b. This is your adjusted gross income ▶	8b	315,553
9 Standard deduction or itemized deductions (from Schedule A)	9	27,000	
10 Qualified business income deduction. Attach Form 8995 or Form 8995-A.	10		
11a Add lines 9 and 10	11a	27,000	
b Taxable income. Subtract line 11a from line 8b. If zero or less, enter -0-	11b	288,553	

12a Tax (see instructions). Check if any from:

1 [] Form(s) 8814 2 [] Form 4972 3 [] 12a 57,602

b Add Schedule 2, line 3, and line 12a and enter the total 12b 57,602

13a Child tax credit or credit for other dependents 13a

b Add Schedule 3, line 7, and line 13a and enter the total 13b 0

14 Subtract line 13b from line 12b. If zero or less, enter -0- 14 57,602

15 Other taxes, including self-employment tax, from Schedule 2, line 10 15 496

16 Add lines 14 and 15. This is your total tax 16 58,098

17 Federal income tax withheld from Forms W-2 and 1099 17 31,878

18 Other payments and refundable credits:

• If you have a qualifying child, attach Sch. EIC.
• If you have nontaxable combat pay, see instructions.

a Earned income credit (EIC) 18a

b Additional child tax credit. Attach Schedule 8812 18b

c American opportunity credit from Form 8863, line 8 18c

d Schedule 3, line 14. 18d

e Add lines 18a through 18d. These are your total other payments and refundable credits 18e

19 Add lines 17 and 18e. These are your total payments 19 31,878

Refund

20 If line 19 is more than line 16, subtract line 16 from line 19. This is the amount you overpaid 20

21 a Amount of line 20 you want refunded to you. If Form 8888 is attached, check here 21a

Direct deposit? See instructions.

b Routing number c Type: [] Checking [] Savings

d Account number

22 Amount of line 20 you want applied to your 2020 estimated tax. 22

Amount You Owe

23 Amount you owe. Subtract line 19 from line 16. For details on how to pay, see instructions. 23 26,666

24 Estimated tax penalty (see instructions) 24 446

Third Party Designee

Do you want to allow another person (other than your paid preparer) to discuss this return with the IRS? See instructions. [] Yes. Complete below. [] No

(Other than paid preparer) 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.

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

Table with columns: Your signature, Date, Your occupation, If the IRS sent you an Identity Protection PIN, enter it here. Includes entries for James Thomasson and Spouse's signature.

Paid Preparer Use Only

Preparer's signature James Thomasson Date 04-01-2020 PTIN P00590650 Check if: [X] 3rd Party Designee [] Self-employed

Preparer's name James Thomasson Phone no. 850-944-8500 Firm's name Accelerated Accounting Firm's address 2400 W Michigan Ave Suite 12 Pensacola, FL 32526 Firm's EIN 72-1345651

SCHEDULE B
(Form 1040 or 1040-SR)

Interest and Ordinary Dividends

OMB No. 1545-0074

2019

Department of the Treasury
Internal Revenue Service (99)

► Go to www.irs.gov/ScheduleB for instructions and the latest information.
► Attach to Form 1040 or 1040-SR.

Attachment
Sequence No. **08**

Name(s) shown on return

Your social security number

THELBERT D & [REDACTED] MORGAN

[REDACTED]

Part I
Interest

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

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

	Amount
1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address ► EGLIN FEDERAL CR UNION	1,639
INTEREST SUBTOTAL	1,639
2 Add the amounts on line 1	1,639
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	
4 Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b	1,639

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

Part II
Ordinary Dividends

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

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

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

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

Part III
Foreign Accounts and Trusts

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

	Yes	No
7a At any time during 2019, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		X
b If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located ►		
8 During 2019, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions		X

SCHEDULE E
(Form 1040 or 1040-SR)

Supplemental Income and Loss

OMB No. 1545-0074

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

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

2019

Department of the Treasury
Internal Revenue Service (99)

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

Attachment
Sequence No. **13**

Name(s) shown on return

Your social security number

THELBERT D & [REDACTED] MORGAN

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 2019 that would require you to file Form(s) 1099? (see instructions) Yes No
B If "Yes," did you or will you file required Forms 1099? Yes No

1a	Physical address of each property (street, city, state, ZIP code)	2	Fair Rental Days	Personal Use Days	QJV
A	2804 DONLEY ST, PENSACOLA, FL 32505	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	0	<input type="checkbox"/>
B	5051 GRANDE DR UNIT I-7, PENSACOLA, FL 32503		B	0	<input type="checkbox"/>
C	5051 GRANDE DRIVE D-3, PENSACOLA, FL 32503		C	0	<input type="checkbox"/>

Type of Property:

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

Income:	Properties:	A	B	C
3 Rents received	3	14,396	12,900	15,600
4 Royalties received	4			
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions	8			
9 Insurance	9	638	873	793
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13			
14 Repairs	14	1,742	1,563	345
15 Supplies	15			
16 Taxes	16	708	2,177	2,221
17 Utilities	17			
18 Depreciation expense or depletion	18	2,182	6,727	5,676
19 Other (list) ▶ TOTAL OTHER EXPENSES	19		1,358	1,358
20 Total expenses. Add lines 5 through 19	20	5,270	12,698	10,393
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	9,126	202	5,207
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		88,496	
b Total of all amounts reported on line 4 for all royalty properties	23b		0	
c Total of all amounts reported on line 12 for all properties	23c		0	
d Total of all amounts reported on line 18 for all properties	23d		35,619	
e Total of all amounts reported on line 20 for all properties	23e		73,186	
24 Income. Add positive amounts shown on line 21. Do not include any losses.	24			21,880
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here.	25			(10,474)
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040 or 1040-SR), line 5, or Form 1040-NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26		NPA 11,406	11,406

SCHEDULE E
(Form 1040 or 1040-SR)

Supplemental Income and Loss

OMB No. 1545-0074

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

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

2019

Attachment
Sequence No. **13**

Department of the Treasury
Internal Revenue Service (99)

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

Name(s) shown on return

Your social security number

THELBERT D & [REDACTED] MORGAN

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 2019 that would require you to file Form(s) 1099? (see instructions) Yes No
B If "Yes," did you or will you file required Forms 1099? Yes No

1a	Physical address of each property (street, city, state, ZIP code)			
A	5051 GRANDE DR UNIT H-1, PENSACOLA, FL 32503			
B	5051 GRANDE DR UNIT L-3, PENSACOLA, FL 32503			
C	5051GRANDE DR, PENSACOLA, FL 32503			

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	0	<input type="checkbox"/>
B	1		B 365	0	<input type="checkbox"/>
C	8		C 365	0	<input type="checkbox"/>

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:	Properties:	A	B	C
3 Rents received	3	9,900	12,600	
4 Royalties received	4			
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			2,181
7 Cleaning and maintenance	7		35	
8 Commissions	8			
9 Insurance	9	757	902	
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13			
14 Repairs	14	30		
15 Supplies	15			371
16 Taxes	16	2,060	2,142	
17 Utilities	17			
18 Depreciation expense or depletion	18	5,254	5,163	
19 Other (list) ▶ <u>Statement #1</u>	19	1,358	1,358	4,018
20 Total expenses. Add lines 5 through 19	20	9,459	9,600	6,570
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	441	3,000	(6,570)
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	()	()	(6,570)
23a Total of all amounts reported on line 3 for all rental properties	23a			
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			
d Total of all amounts reported on line 18 for all properties	23d			
e Total of all amounts reported on line 20 for all properties	23e			
24 Income. Add positive amounts shown on line 21. Do not include any losses.	24			
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, IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040 or 1040-SR), line 5, or Form 1040-NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26			

For Paperwork Reduction Act Notice, see the separate instructions.

SCHEDULE E
(Form 1040 or 1040-SR)

Supplemental Income and Loss

OMB No. 1545-0074

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

2019

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

Attachment
Sequence No. **13**

Department of the Treasury
Internal Revenue Service (99)

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

Name(s) shown on return

Your social security number

THELBERT D & [REDACTED] MORGAN

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 2019 that would require you to file Form(s) 1099? (see instructions) Yes No
B If "Yes," did you or will you file required Forms 1099? Yes No

1a	Physical address of each property (street, city, state, ZIP code)		
A	5051 GRANDE DR G4, PENSACOLA, FL 32503		
B	5051 GRANDE DR L5, PENSACOLA, FL 32503		
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 Days	Personal Use Days	QJV
A	1		365	0	<input type="checkbox"/>
B	1		365	0	<input type="checkbox"/>
C					<input type="checkbox"/>

- 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:	Properties:	A	B	C
3 Rents received	3	10,500	12,600	
4 Royalties received	4			
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7	50		
8 Commissions	8			
9 Insurance	9	670		
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13			
14 Repairs	14		1,010	
15 Supplies	15			
16 Taxes	16	1,979	2,109	
17 Utilities	17		45	
18 Depreciation expense or depletion	18	5,890	4,727	
19 Other (list) ▶ HOA	19	1,358	1,358	
20 Total expenses. Add lines 5 through 19	20	9,947	9,249	
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	553	3,351	
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	(553)	(3,351)	()
23a Total of all amounts reported on line 3 for all rental properties	23a			
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			
d Total of all amounts reported on line 18 for all properties	23d			
e Total of all amounts reported on line 20 for all properties	23e			
24 Income. Add positive amounts shown on line 21. Do not include any losses.	24			
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, IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040 or 1040-SR), line 5, or Form 1040-NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26			

Net Investment Income Tax- Individuals, Estates, and Trusts

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

Go to www.irs.gov/Form8960 for instructions and the latest information.

Name(s) shown on your tax return

Your social security number or EIN

THELBERT D & MORGAN

- Part I Investment Income
Section 6013(g) election (see instructions)
Section 6013(h) election (see instructions)
Regulations section 1.1411-10(g) election (see instructions)

Table with 8 rows and 3 columns. Row 1: Taxable interest (see instructions) 1,639. Row 2: Ordinary dividends (see instructions) 2. Row 3: Annuities (see instructions) 3. Row 4a: Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions) 11,406. Row 4b: Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions). Row 4c: Combine lines 4a and 4b 11,406. Row 5a: Net gain or loss from disposition of property (see instructions). Row 5b: Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions). Row 5c: Adjustment from disposition of partnership interest or S corporation stock (see instructions). Row 5d: Combine lines 5a through 5c 0. Row 6: Adjustments to investment income for certain CFCs and PFICs (see instructions). Row 7: Other modifications to investment income (see instructions). Row 8: Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7 13,045.

Part II Investment Expenses Allocable to Investment Income and Modifications

Table with 11 rows and 3 columns. Row 9a: Investment interest expenses (see instructions). Row 9b: State, local, and foreign income tax (see instructions). Row 9c: Miscellaneous investment expenses (see instructions). Row 9d: Add lines 9a, 9b, and 9c 0. Row 10: Additional modifications (see instructions). Row 11: Total deductions and modifications. Add lines 9d and 10 0.

Part III Tax Computation

Table with 21 rows and 3 columns. Row 12: Net investment income. Subtract Part II, line 11 from Part I, line 8. Individuals complete lines 13-17. Estates and trusts complete lines 18a-21. If zero or less, enter -0- 13,045. Row 13: Modified adjusted gross income (see instructions) 315,553. Row 14: Threshold based on filing status (see instructions) 250,000. Row 15: Subtract line 14 from line 13. If zero or less, enter -0- 65,553. Row 16: Enter the smaller of line 12 or line 15 13,045. Row 17: Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). Enter here and include on your tax return (see instructions) 496. Row 18a: Net investment income (line 12 above). Row 18b: Deductions for distributions of net investment income and deductions under section 642(c) (see instructions). Row 18c: Undistributed net investment income. Subtract line 18b from 18a (see instructions). If zero or less, enter -0-. Row 19a: Adjusted gross income (see instructions). Row 19b: Highest tax bracket for estates and trusts for the year (see instructions). Row 19c: Subtract line 19b from line 19a. If zero or less, enter -0-. Row 20: Enter the smaller of line 18c or line 19c. Row 21: Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions).

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

Passive Activity Loss Limitations

▶ See separate instructions.

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

▶ Go to www.irs.gov/Form8582 for instructions and the latest information.

2019

Attachment
Sequence No. **88**

Department of the Treasury
Internal Revenue Service (99)

Name(s) shown on return

Identifying number

THELBERT D & [REDACTED] MORGAN

[REDACTED]

Part I 2019 Passive Activity Loss

Caution: Complete Worksheets 1, 2, and 3 before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation, see

Special Allowance for Rental Real Estate Activities in the instructions.)

1a Activities with net income (enter the amount from Worksheet 1, column (a))	1a	3,904		
b Activities with net loss (enter the amount from Worksheet 1, column (b))	1b	()		
c Prior years' unallowed losses (enter the amount from Worksheet 1, column (c))	1c	(21,080)		
d Combine lines 1a, 1b, and 1c			1d	(17,176)

Commercial Revitalization Deductions From Rental Real Estate Activities

2a Commercial revitalization deductions from Worksheet 2, column (a)	2a	()		
b Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)	2b	()		
c Add lines 2a and 2b			2c	()

All Other Passive Activities

3a Activities with net income (enter the amount from Worksheet 3, column (a))	3a			
b Activities with net loss (enter the amount from Worksheet 3, column (b))	3b	()		
c Prior years' unallowed losses (enter the amount from Worksheet 3, column (c))	3c	()		
d Combine lines 3a, 3b, and 3c			3d	

4 Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used			4	(17,176)
--	--	--	----------	----------

- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
 - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
 - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II or Part III. Instead, go to line 15.

Part II Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

5 Enter the smaller of the loss on line 1d or the loss on line 4	5	17,176
6 Enter \$150,000. If married filing separately, see instructions	6	150,000
7 Enter modified adjusted gross income, but not less than zero. See instructions	7	277,678
Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.		
8 Subtract line 7 from line 6	8	
9 Multiply line 8 by 50% (0.50). Do not enter more than \$25,000. If married filing separately, see instructions	9	
10 Enter the smaller of line 5 or line 9	10	0

If line 2c is a loss, go to Part III. Otherwise, go to line 15.

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions.

11 Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	11	
12 Enter the loss from line 4	12	
13 Reduce line 12 by the amount on line 10	13	
14 Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13.	14	

Part IV Total Losses Allowed

15 Add the income, if any, on lines 1a and 3a and enter the total	15	3,904
16 Total losses allowed from all passive activities for 2019. Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return	16	3,904

For Paperwork Reduction Act Notice, see instructions.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

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

Name(s) shown on return: CHELBERG D & MORGAN; Business or activity to which this form relates: RESIDENTIAL RENTAL; Identifying number: [REDACTED]

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.

Form I lines 1-13: 1 Maximum amount, 2 Total cost, 3 Threshold cost, 4 Reduction in limitation, 5 Dollar limitation, 6-12 Property details and calculations.

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.)

Form II lines 14-16: 14 Special depreciation allowance, 15 Property subject to section 168(f)(1) election, 16 Other depreciation (including ACRS).

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

Form III Section A lines 17-18: 17 MACRS deductions for assets placed in service in tax years beginning before 2019 (4,727); 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 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year property, Residential rental property, and Nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 7 columns: (a) Class life, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 12-year, 30-year, and 40-year class life.

Part IV Summary (See instructions.)

Form IV lines 19-23: 19 Listed property, 20 Total, 21 Enter here and on the appropriate lines of your return, 22 Partnerships and S corporations, 23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

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

Name(s) shown on return: WELBERT D & MORGAN; Business or activity to which this form relates: RESIDENTIAL RENTAL; Identifying number: [redacted]

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.

Table with 5 main rows for Section 179 election. Line 1: Maximum amount; Line 2: Total cost; Line 3: Threshold cost; Line 4: Reduction in limitation; Line 5: Dollar limitation. Includes a table for property descriptions (a-c) and summary lines 7-13.

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.)

Table with 3 rows for Special Depreciation Allowance and Other Depreciation. Line 14: Special depreciation allowance; Line 15: Property subject to section 168(f)(1) election; Line 16: Other depreciation (including ACRS).

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

Section A

Table with 2 rows for MACRS Depreciation. Line 17: MACRS deductions for assets placed in service in tax years beginning before 2019 (5,890); Line 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 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year property, Residential rental property, and Nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 6 columns: (a) Class life, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 12-year, 30-year, and 40-year class lives.

Part IV Summary (See instructions.)

Table with 3 rows for Summary. Line 21: Listed property; Line 22: Total (5,890); Line 23: For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

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

Name(s) shown on return: WILBERT D & MORGAN; Business or activity to which this form relates: UNALLOCATED; Identifying number: [redacted]

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.

Form Part I lines 1-13: Maximum amount, Total cost, Threshold cost, Reduction in limitation, Dollar limitation, Description of property, Cost, Elected cost, Listed property, Total elected cost, Tentative deduction, Carryover, Business income limitation, Section 179 expense deduction, Carryover to 2020.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

Form Part II lines 14-16: Special depreciation allowance, Property subject to section 168(f)(1) election, Other depreciation (including ACRS).

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

Form Part III lines 17-18: MACRS deductions for assets placed in service in tax years beginning before 2019; 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 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year property, Residential rental property, Nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 7 columns: (a) Class life, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 12-year, 30-year, 40-year class life.

Part IV Summary (See instructions.)

Form Part IV lines 21-23: Listed property, Total, For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

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

Name(s) shown on return

Business or activity to which this form relates

Identifying number

THELBERT D & MORGAN

RESIDENTIAL RENTAL

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.

Table with 13 rows for Section 179 election. Rows include: 1. Maximum amount, 2. Total cost of section 179 property, 3. Threshold cost, 4. Reduction in limitation, 5. Dollar limitation, 6-7. Description and cost of listed property, 8-12. Total elected cost, tentative deduction, carryover, business income limitation, and final deduction.

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.)

Table with 3 rows for Special Depreciation Allowance and Other Depreciation. Rows include: 14. Special depreciation allowance, 15. Property subject to section 168(f)(1) election, 16. Other depreciation (including ACRS).

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

Section A: Table with 2 rows for MACRS deductions. Row 17: MACRS deductions for assets placed in service in tax years beginning before 2019. Row 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 2019 Tax Year Using the General Depreciation System. Table with 7 columns: (a) Classification of property, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year property, Residential rental property, and Nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System. Table with 6 columns: (a) Class life, (b) Recovery period, (c) Convention, (d) Method, (e) Depreciation deduction. Rows include 12-year, 30-year, and 40-year class lives.

Part IV Summary (See instructions.)

Table with 3 rows for Summary. Row 21: Listed property. Row 22: Total. Row 23: For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.

For Paperwork Reduction Act Notice, see separate instructions.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

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

Name(s) shown on return: CHELBERG D & MORGAN; Business or activity to which this form relates: RESIDENTIAL RENTAL; Identifying number: [redacted]

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.

Table with 13 rows for Section 179 election. Line 1: Maximum amount; Line 2: Total cost; Line 3: Threshold cost; Line 4: Reduction in limitation; Line 5: Dollar limitation; Line 6: Description of property; Line 7: Listed property; Line 8: Total elected cost; Line 9: Tentative deduction; Line 10: Carryover of disallowed deduction; Line 11: Business income limitation; Line 12: Section 179 expense deduction; Line 13: Carryover of disallowed deduction to 2020.

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.)

Table with 3 rows for Special Depreciation Allowance. Line 14: Special depreciation allowance; Line 15: Property subject to section 168(f)(1) election; Line 16: Other depreciation (including ACRS).

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

Section A: Line 17: MACRS deductions for assets placed in service in tax years beginning before 2019 (Total: 2,182); Line 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 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year, Residential rental property, and Nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 4 rows for Alternative Depreciation System. Line 20a: Class life; Line 20b: 12-year; Line 20c: 30-year; Line 20d: 40-year.

Part IV Summary (See instructions.)

Summary table with 3 rows. Line 21: Listed property; Line 22: Total (2,182); Line 23: For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return.

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

Name(s) shown on return: THELBERT D & MORGAN; Business or activity to which this form relates: RESIDENTIAL RENTAL; Identifying number: [REDACTED]

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.

Form I: Lines 1-13. Includes fields for maximum amount, total cost, threshold cost, reduction in limitation, dollar limitation, and a table for property description, cost, and elected cost.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

Form II: Lines 14-16. Includes fields for special depreciation allowance, property subject to section 168(f)(1) election, and other depreciation.

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

Form III: Lines 17-18. Includes fields for MACRS deductions for assets placed in service in tax years beginning before 2019 and a checkbox for electing to group assets.

Section B - Assets Placed in Service During 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month/year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year, residential rental, and nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 7 columns: (a) Class life, (b) Recovery period, (c) Convention, (d) Method, (e) Depreciation deduction. Rows include 12-year, 30-year, and 40-year class lives.

Part IV Summary (See instructions.)

Form IV: Lines 21-23. Includes fields for listed property amount, total amount, and portion of basis attributable to section 263A costs.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

Attach to your tax return. Go to www.irs.gov/Form4562 for instructions and the latest information.

Name(s) shown on return THELSEB D MORGAN

Business or activity to which this form relates RENTAL

Identifying number

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.

Table with 13 rows for Part I. Columns include line numbers and descriptions of property and costs. Line 17 shows a total of 5,676.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

Table with 3 rows for Part II. Columns include line numbers and descriptions of special depreciation allowance and other depreciation.

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

Table with 2 rows for Part III. Column 17 shows a total of 5,676.

Section B - Assets Placed in Service During 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 4 columns: (a) Class life, (b) Recovery period, (c) Convention, (d) Method.

Part IV Summary (See instructions.)

Table with 3 rows for Part IV. Column 22 shows a total of 5,676.

Depreciation and Amortization (Including Information on Listed Property)

Department of the Treasury Internal Revenue Service (99)

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

Business or activity to which this form relates

Identifying number

THELBERT D & MORGAN

RESIDENTIAL RENTAL

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.

Form I lines 1-13: Maximum amount, Total cost of section 179 property, Threshold cost, Reduction in limitation, Dollar limitation, Description of property, Total elected cost, Tentative deduction, Carryover of disallowed deduction, Business income limitation, Section 179 expense deduction, Carryover of disallowed deduction to 2020.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

Form II lines 14-16: Special depreciation allowance for qualified property, Property subject to section 168(f)(1) election, Other depreciation (including ACRS).

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

Section A

Form III lines 17-18: MACRS deductions for assets placed in service in tax years beginning before 2019, 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 2019 Tax Year Using the General Depreciation System

Table with 7 columns: (a) Classification of property, (b) Month and year placed in service, (c) Basis for depreciation, (d) Recovery period, (e) Convention, (f) Method, (g) Depreciation deduction. Rows include 3-year, 5-year, 7-year, 10-year, 15-year, 20-year, 25-year property, Residential rental property, Nonresidential real property.

Section C - Assets Placed in Service During 2019 Tax Year Using the Alternative Depreciation System

Table with 6 columns: (a) Class life, (b) Recovery period, (c) Convention, (d) Method, (e) Depreciation deduction. Rows include 12-year, 30-year, 40-year.

Part IV Summary (See instructions.)

Form IV lines 21-23: Listed property, Total, For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs.

For Paperwork Reduction Act Notice, see separate instructions.

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? [X] Yes [] No 24b If "Yes," is the evidence written? [X] Yes [] No

Table with columns (a) through (i) for depreciation and other information. Includes rows for special depreciation allowance (25), property used more than 50% in a qualified business use, and property used 50% or less in a qualified business use.

Section B - Information on Use of Vehicle

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.

Table for Section B with columns (a) through (f) for vehicle information and a grid for personal use questions (34-36).

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who aren't more than 5% owners or related persons. See instructions.

Table for Section C with questions 37-41 and Yes/No columns.

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," don't complete Section B for the covered vehicles.

Part VI Amortization




Table for Section VI with columns (a) through (f) for amortization of costs. Includes rows for 2019 tax year, costs before 2019, and a total row.

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

CI945693A-1128228537-2
CI945693A-1
128228537-2

2019

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

Box 1. Name THELBERT D MORGAN		Box 2. Beneficiary's Social Security Number 
Box 3. Benefits Paid in 2019 \$26,343.90	Box 4. Benefits Repaid to SSA in 2019 NONE	Box 5. Net Benefits for 2019 (Box 3 minus Box 4) \$26,343.90
<p align="center">DESCRIPTION OF AMOUNT IN BOX 3</p> <p>Paid by check or direct deposit \$23,364.00 Medicare Part B premiums deducted from your benefits \$2,979.90 Total Additions \$26,343.90 Benefits for 2019 \$26,343.90</p>		<p align="center">DESCRIPTION OF AMOUNT IN BOX 4</p> <p align="center">NONE</p>
		Box 6. Voluntary Federal Income Tax Withheld NONE
		Box 7. Address THELBERT D MORGAN 
		Box 8. Claim Number (Use this number if you need to contact SSA.) 

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2019 • PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
 • SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name [REDACTED] MORGAN	Box 2. Beneficiary's Social Security Number [REDACTED]
----------------------------------	---

Box 3. Benefits Paid in 2019 <p style="text-align: center;">\$18,214.80</p>	Box 4. Benefits Repaid to SSA in 2019 <p style="text-align: center;">NONE</p>	Box 5. Net Benefits for 2019 (Box 3 minus Box 4) <p style="text-align: center;">\$18,214.80</p>
--	--	--

DESCRIPTION OF AMOUNT IN BOX 3	
Paid by check or direct deposit	\$14,964.00
Medicare Part B premiums deducted from your benefits	\$3,250.80
Total Additions	\$18,214.80
Benefits for 2019	\$18,214.80

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

NONE

Box 7. Address

[REDACTED] MORGAN
 [REDACTED]

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

[REDACTED]

16-0331690 Department of the Treasury - Internal Revenue Service

Form **W-2 Wages and Tax Statement** **2019**

OMB No: 1545-0008

Copy 2 To Be Filed with Employee's State, City, or Local Income Tax Return.

c Employer's name, address, and ZIP code COUNTY OF ESCAMBIA OFFICE OF SHERIFF PENSACOLA, FL 32523	7 Social security tips	1 Wages, tips, other compensation	2 Federal income tax withheld
	8 Allocated tips	3 Social security wages	4 Social security tax withheld
e Employee's name, address, and ZIP code THELBERT DAVID MORGAN [REDACTED]	12a See instruction for box 12	5 Medicare wages and tips	6 Medicare tax withheld
	12b	10 Dependent care benefits	11 Nonqualified plans
b Employer identification number 59-6000601	12c	13 Statutory emp Retirement plan Third-party sick-pay	14 Other
	a Employee's social security no.		
15 State	16 State wages, tips, etc	17 State income tax	18 Local wages, tips, etc
Employer's state ID number			19 Local income tax
			20 Locality name

Form **W-2 Wage and Tax Statement** **2019**

[REDACTED]	7 Social security tips	1 Wages, tips, other compensation	2 Federal income tax withheld
	8 Allocated tips	3 Social security wages	4 Social security tax withheld
e Employee's name, address, and ZIP code [REDACTED] MORGAN [REDACTED]	9	5 Medicare wages and tips	6 Medicare tax withheld
	10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12
b Employer identification no. (EIN) 59-1207555	12b	13 Statutory emp Retirement plan Third-party sick-pay	14 Other
	a Employee's social security no.		
15 State	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.
Employer's state ID number			19 Local income tax
			20 Locality name

VOID CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CITY OF PENSACOLA P. O. BOX 12910 PENSACOLA, FL 32521-0061 (850) 435-1818		1 Rents \$ 6,252.00 2 Royalties \$	OMB No. 1545-0115 2019 Form 1099-MISC	Miscellaneous Income Copy 1 For State Tax Department	
PAYER'S federal identification number [REDACTED]	RECIPIENT'S identification number [REDACTED]	3 Other income \$	4 Federal income tax withheld \$		
RECIPIENT'S name MORGAN, THELBERT D Street address (including apt. no.) P O BOX 30347 City or town, state or province, country, and ZIP or foreign postal code PENSACOLA, FL 32503		5 Fishing boat proceeds \$	6 Medical and health care payments \$		
		7 Nonemployee compensation \$	8 Substitute payments in lieu of dividends or interest \$		
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/>	10 Crop insurance proceeds \$		
		11	12		
Account number (see instructions)	FATCA filing requirement <input type="checkbox"/>	13 Excess golden parachute payments \$	14 Gross proceeds paid to an attorney \$		
15a Section 409A deferrals \$	15b Section 409A income \$	16 State tax withheld \$	17 State/Payer's state no.	18 State Income \$	

Form 1099-MISC

www.irs.gov/form1099misc

Department of the Treasury - Internal Revenue Service

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TAX STATEMENT 1099R

Printer Friendly 1099R 



2019

Control Number		<input type="checkbox"/> CORRECTED (if checked)		OMB No. 1545-0119 2019 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code and telephone no. Defense Finance and Accounting Service U.S. Military Retired Pay 8899 E 56th Street Indianapolis IN 46249-1200		1 Gross distribution \$ 39267.16	2a Taxable amount \$ 39267.16			
PAYER'S Federal identification number [REDACTED]	RECIPIENT'S identification Number [REDACTED]	2b <input type="checkbox"/> Taxable amount not determined <input type="checkbox"/> Total Distribution		Copy 2 File this copy with your state, city, or local income tax return when required		
RECIPIENT'S name, street address, city or town, state or province, country, and ZIP or foreign postal code THELBERT D MORGAN [REDACTED]		4 Federal Income tax withheld \$ 2908.42	7 Distribution code 7			
		9 Your percentage of total distribution %				
		12 State tax withheld \$.00	13 State/Payer's state no.			
		RETIRED 01012019-12312019				


Form 1099-R

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TAX STATEMENT 1099R

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2019



Control Number		<input type="checkbox"/> CORRECTED (if checked)		
PAYER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code and telephone no. Defense Finance and Accounting Service U.S. Military Retired Pay 8899 E 56th Street Indianapolis IN 46249-1200		1 Gross distribution \$ 71212.76	OMB No. 1545-0119 2019 Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
		2a Taxable amount \$ 71212.76		
PAYER'S Federal identification number [REDACTED]	RECIPIENT'S identification Number [REDACTED]	2b <input type="checkbox"/> Taxable amount not determined <input type="checkbox"/> Total Distribution		Copy 2 File this copy with your state, city, or local income tax return when required
RECIPIENT'S name, street address, city or town, state or province, country, and ZIP or foreign postal code [REDACTED] MORGAN		4 Federal income tax withheld \$ 6741.88	7 Distribution code 7	
		9 Your percentage of total distribution %		
		12 State tax withheld \$.00	13 State/Payer's state no.	
		RETIRED 01012019-12312019		

Form 1099-R

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