

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side

Social security number or taxpayer identification number

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☒ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ **(E)** Long-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS

☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	19.00000 Long-term Gain	03/01/2021	11/30/2024	19,000.00	17,500.00			1,500.00
	20.00000 Long-term Loss	03/02/2021	11/29/2024	20,000.00	21,000.00			(1,000.00)
	21.00000 Long-term Loss with Wash Adj	03/03/2021	11/28/2024	21,000.00	22,000.00	W	650.00	(350.00)
	28.00000 Long-term Gain, Various	Various	11/21/2024	28,000.00	24,000.00			4,000.00
	29.00000 Long-term Loss, Various	Various	11/20/2024	29,000.00	33,000.00			(4,000.00)
	30.00000 Long-term Loss with Wash Adj, Various	Various	11/19/2024	30,000.00	32,000.00	W	950.00	(1,050.00)
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked).				147,000.00	149,500.00		1,600.00	(900.00)

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

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- ☐ **(D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
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- ☐ **(F)** Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
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	22.00000 Long-term Gain, Basis Not Reported	03/04/2021	11/27/2024	22,000.00	19,300.00			2,700.00
	23.00000 Long-term Loss, Basis Not Reported	03/05/2021	11/26/2024	23,000.00	24,100.00			(1,100.00)
	24.00000 Long-term Loss with Wash Adj, Basis Not	03/06/2021	11/25/2024	24,000.00	25,300.00	W	750.00	(550.00)
	31.00000 Long-term Gain, Basis Not Reported, Various	Various	11/18/2024	31,000.00	26,000.00			5,000.00
	32.00000 Long-term Loss, Basis Not Reported, Various	Various	11/17/2024	32,000.00	34,500.00			(2,500.00)
	33.00000 Long-term Loss with Wash Adj, Basis Not	Various	11/16/2024	33,000.00	35,400.00	W	1,050.00	(1,350.00)
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) . . .				165,000.00	164,600.00		1,800.00	2,200.00

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- ☒ **(F)** Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions.	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	25.00000 Long-term Gain, No 1099-B	03/07/2021	11/24/2024	25,000.00	23,100.00			1,900.00
	26.00000 Long-term Loss, No 1099-B	03/08/2021	11/23/2024	26,000.00	27,600.00			(1,600.00)
	27.00000 Long-term Loss with Wash Adj, No 1099-B	03/09/2021	11/22/2024	27,000.00	28,100.00	W	850.00	(250.00)
	34.00000 Long-term Gain, No 1099-B, Various	Various	11/15/2024	34,000.00	30,000.00			4,000.00
	35.00000 Long-term Loss, No 1099-B, Various	Various	11/14/2024	35,000.00	38,300.00			(3,300.00)
	36.00000 Long-term Loss with Wash Adj, No 1099-B,	Various	11/13/2024	36,000.00	39,100.00	W	1,150.00	(1,950.00)
2 Totals.	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) . . .			183,000.00	186,200.00		2,000.00	(1,200.00)

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