



NAME OF TAXPAYER

SOCIAL SECURITY/EMPLOYER IDENTIFICATION NUMBER

Schedule 4% Surtax. (For Filers of Form 1; Form 1-NR/PY; Form MA NRCR; Form 2; Form M-990T-62; and Form 3M.)

2023

Enclose this form with your return.

- 1** Enter the amount from Form 1, line 19; Form 1-NR/PY, line 23; Form MA NRCR, line 5b; Form 2, line 21; Form M-990T-62, line 21; or Form 3M, line 1. Not less than zero. 1

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- 2** Enter the amount from Form 1, Schedule B line 37; Form 1-NR/PY, Schedule B line 37; Form MA NRCR, Schedule B line 37; Form 2, line 29; Form M-990T-62, line 25; or Form 3M, Schedule B, line 27. Not less than zero. 2

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- 3** Enter the amount from Form 1, Schedule D, line 21 or Schedule D-IS, line 24; Form 1-NR/PY, Schedule D, line 21 or Schedule D-IS, line 24; Form 2, line 37 and Schedule D-IS, lines 25, 26a-27a; or Form 3M, Schedule D, line 16; Not less than zero. 3

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- 4** Combine lines 1 through 3. **Note:** If less than \$1,000,000, the 4% Surtax does not apply. Do not submit this schedule. 4

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- 5** Surtax threshold. Enter \$1,000,000 in line 5 5

1 0 0 0 0 0 0 0 0 0
- 6** Subtract line 5 from line 4 6

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- 7** Multiply line 6 by .04 (4%) and enter this amount on Form 1, line 28b; Form 1-NR/PY, line 32b; Form MA NRCR, line 14b; Form 2, line 41b; Form M-990T-62, line 29b; or Form 3M, line 9b. 7

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