

2023 Schedule 4% Surtax

Schedule 4% Surtax. For filers of Form 1; Form 1-NR/PY; Form 2; Form M-990T-62; and Form 3M

1. Enter the amount from Form 1, line 19; Form 1-NR/PY, line 23; Form 2, line 21; Form M-990T-62, line 21; or Form 3M, line 1. Not less than zero 1
2. Enter the amount from Form 1, Schedule B line 37; Form 1-NR/PY, 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
3. Enter the amount from Form 1, Schedule D, line 21 or Schedule D-IS, sum of part 3 column 1 lines 26 a-h; Form 1-NR/PY, Schedule D, line 21 or Schedule D-IS, sum of part 3 column 1 lines 26 a-h; Form 2, line 37; or Form 3M, Schedule D, line 16; Not less than zero 3
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
5. Surtax threshold. Enter \$1,000,000 in line 5 5
6. Subtract line 5 from line 4 6
7. Multiply line 6 by .04 (4%) and enter this amount on Form 1, line 28b; Form 1-NR/PY, line 32b; Form 2, line 41b; Form M-990T-62, line 29b; or Form 3M, line 9b. 7