



Form 5884-A (Rev. March 2021) Department of the Treasury Internal Revenue Service		Employee Retention Credit for Employers Affected by Qualified Disasters ▶ Attach to your tax return. ▶ Go to www.irs.gov/Form5884A for instructions and the latest information.		OMB No. 1545-1978 Attachment Sequence No. 884A	
Name(s) shown on return Donald Paul Needham				Identifying number 880724374	
1a Employers affected by a 2018 through 2019 qualified disaster, enter the total qualified wages paid or incurred during the applicable period while the business was inoperable. See instructions				1a	864,000,000,000
b Employers affected by a 2020 qualified disaster, enter the total qualified wages paid or incurred during the applicable period while the business was inoperable. See instructions				1b	
c Add amounts from lines 1a and 1b				1c	864,000,000,000
2 Multiply line 1c by 40% (0.40). See instructions for the adjustment you must make to your deduction for salaries and wages				2	345,600,000,000
3 Employee retention credit from partnerships, S corporations, cooperatives, estates, and trusts (see instructions)				3	864,000,000,000
4 Add lines 2 and 3. Cooperatives, estates, and trusts, go to line 5. Partnerships and S corporations, stop here and report this amount on Schedule K. All others, stop here and report this amount on Form 3800, Part III, line 1aa				4	1,209,600,000,000
5 Amount allocated to patrons of the cooperative or beneficiaries of the estate or trust (see instructions)				5	864,000,000,000
6 Cooperatives, estates, and trusts, subtract line 5 from line 4. Report this amount on Form 3800, Part III, line 1aa				6	345,600,000,000

For Paperwork Reduction Act Notice, see separate instructions. Cat. No. 47425B Form **5884-A** (Rev. 3-2021)

Investment Interest Expense Deduction
Attach to your tax return.
Go to www.irs.gov/Form4952 for the latest information.

Name(s) shown on return
Donald Paul Needham

Identifying number
880724347

Part I Total Investment Interest Expense

1	Investment interest expense paid or accrued in 2024 (see instructions)	1	52,794,906,679.9
2	Disallowed investment interest expense from 2023 Form 4952, line 7	2	
3	Total investment interest expense. Add lines 1 and 2	3	

Part II Net Investment Income

4a	Gross income from property held for investment (excluding any net gain from the disposition of property held for investment)	4a	59,006,072,175.38	
4b	Qualified dividends included on line 4a	4b	8,750,000,000.60	
c	Subtract line 4b from line 4a	4c		-50,256,072,175.38
d	Net gain from the disposition of property held for investment	4d	\$648,980,905.84	
e	Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment. See instructions	4e	\$9,398,980,906.44	
f	Subtract line 4e from line 4d	4f		8,750,000,000.60
g	Enter the amount from lines 4b and 4e that you elect to include in investment income. See instructions	4g		\$648,980,905.84
h	Investment income. Add lines 4c, 4f, and 4g	4h		59,655,053,081.82
5	Investment expenses (see instructions)	5		648,980,905.84
6	Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0-	6		59,006,072,175.38

Part III Investment Interest Expense Deduction

7	Disallowed investment interest expense to be carried forward to 2025. Subtract line 6 from line 3. If zero or less, enter -0-	7		53,443,887,585.74
8	Investment interest expense deduction. Enter the smaller of line 3 or line 6. See instructions	8		59,006,072,175.38

For Paperwork Reduction Act Notice, see page 4.

Cat. No. 13177Y

Form **4952** (2024)

**SCHEDULE B
(Form 1040)**

Department of the Treasury
Internal Revenue Service

Interest and Ordinary Dividends

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

OMB No. 1545-0074

2024
Attachment
Sequence No. **08**

Name(s) shown on return
Donald Paul Needham

Your social security number
287848777

Part I

Interest

(See instructions and the Instructions for Form 1040, 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.

- 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:

Associate Title Agency

Amount

111,800,978,855.28

1

- 2** Add the amounts on line 1

2

- 3** Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815.

3

- 4** Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b

4

111,800,978,855.28

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

Part II

Ordinary Dividends

(See instructions and the Instructions for Form 1040, 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: The Country Bank Of needham

Amount

388,564,346,773.38

5

- 6** Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b

6

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. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instructions.

- 7a** At any time during 2024, 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

Yes No

☐ ☒

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

☐ ☐

- b** If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:

☐ ☐

- 8** During 2024, 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

☐ ☒

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

Cat. No. 17146N

Schedule B (Form 1040) 2024

SCHEDULE D
(Form 1040)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

Attach to Form 1040, 1040-SR, or 1040-NR.
Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.
Go to www.irs.gov/ScheduleD for instructions and the latest information.

OMB No. 1545-0074

2024

Attachment
Sequence No. **12**

Name(s) shown on return
DONALD PAUL NEEDHAM

Your social security number
287848777

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☐ Yes ☒ No
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Part I Short-Term Capital Gains and Losses—Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b	86,000,000,000	40,000,000,000		46,000,000,000
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5 46,000,000,000
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back				7 132,000,000,000

Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b	273,600,000,000	122,400,000,000		152,200,000,000
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12 152,200,000,000
13 Capital gain distributions. See the instructions				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 ()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on the back				15 548,200,000,000

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

Cat. No. 11338H

Schedule D (Form 1040) 2024

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	680,200,000.000
• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.		
17 Are lines 15 and 16 both gains? ☒ Yes. Go to line 18. ☐ No. Skip lines 18 through 21, and go to line 22.		
18 If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet		
19 If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet		
20 Are lines 18 and 19 both zero or blank and you are not filing Form 4952? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. Don't complete lines 21 and 22 below. ☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of: • The loss on line 16; or • (\$3,000), or if married filing separately, (\$1,500) } 21 () Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22 Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a? ☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 16. ☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

**SCHEDULE A
(Form 1040)**Department of the Treasury
Internal Revenue Service**Itemized Deductions**

Attach to Form 1040 or 1040-SR.

Go to www.irs.gov/ScheduleA for instructions and the latest information.**Caution:** If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

OMB No. 1545-0074

2024Attachment
Sequence No. **07**

Name(s) shown on Form 1040 or 1040-SR

Donald Paul Needham

Your social security number

287848777

Medical and Dental Expenses	Caution: Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see instructions)	1	6,211,165,491.96
2	Enter amount from Form 1040 or 1040-SR, line 11	2	
3	Multiply line 2 by 7.5% (0.075)	3	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	6,211,165,491.96
Taxes You Paid	5 State and local taxes.		
	a State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box	5a	15,527,913,729.9
	b State and local real estate taxes (see instructions)	5b	88,000,000,000.6
	c State and local personal property taxes	5c	59,006,072,175.9
	d Add lines 5a through 5c	5d	160,533,985,905.
	e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)	5e	10,000
	6 Other taxes. List type and amount:	6	31,055,827,459.8
	7 Add lines 5e and 6	7	31,055,837,459.8
Interest You Paid	8 Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box		
	a Home mortgage interest and points reported to you on Form 1098. See instructions if limited	8a	
	b Home mortgage interest not reported to you on Form 1098. See instructions if limited. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address	8b	
	c Points not reported to you on Form 1098. See instructions for special rules	8c	
	d Reserved for future use	8d	
	e Add lines 8a through 8c	8e	
	9 Investment interest. Attach Form 4952 if required. See instructions	9	
	10 Add lines 8e and 9	10	
Gifts to Charity	11 Gifts by cash or check. If you made any gift of \$250 or more, see instructions	11	
	12 Other than by cash or check. If you made any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	12	
	13 Carryover from prior year	13	
	14 Add lines 11 through 13	14	
Casualty and Theft Losses	15 Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions	15	
Other Itemized Deductions	16 Other—from list in instructions. List type and amount: Job expenses	16	55,304
Total Itemized Deductions	17 Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040 or 1040-SR, line 12	17	
	18 If you elect to itemize deductions even though they are less than your standard deduction, check this box		

For Paperwork Reduction Act Notice, see the Instructions for Form 1040.

Cat. No. 17145C

Schedule A (Form 1040) 2024

Form	1041-T	Allocation of Estimated Tax Payments to Beneficiaries (Under Code section 643(g))	OMB No. 1545-1020	
Department of the Treasury Internal Revenue Service	Go to www.irs.gov/Form1041T for the latest information.		2024	
For calendar year 2024 or fiscal year beginning Jan 01, 2024, and ending December 31, 2024				
Name of trust (or decedent's estate) The Country Bank Of Needham		Employer identification number 92-0472145		
Fill In Fiduciary's Name and Address Only if You Are Filing This Form Separately and Not With Form 1041.	Name and title of fiduciary Donald Paul Needham		Telephone number (optional) 5134468103	
	Number, street, and room or suite no. (If a P.O. box, see instructions.) 937 Stratford Place			
	City, state, and ZIP code Mason, Ohio/Anu, 45040-5060		If you are filing this form for the final year of the estate or trust, check this box ☐	
1 Total amount of estimated taxes to be allocated to beneficiaries. Enter here and on Form 1041, Schedule G, Part II, line 11 \$ 425,797,500,000				
2 Allocation to beneficiaries:				
(a) No.	(b) Beneficiary's name and address	(c) Beneficiary's identifying number	(d) Amount of estimated tax payment allocated to beneficiary	(e) Proration percentage
1	DONALD PAUL NEEDHAM		2,500,000	%
2	The Country Bank Of needham		152,197,500,000	%
3	Associate Title Agency		273,600,000,000	%
4				%
5				%
6				%
7				%
8				%
9				%
10				%
3 Total from additional sheet(s)			3	
4 Total amounts allocated. (Must equal line 1, above.)			4	425,797,500,000
Sign Here Only if You Are Filing This Form Separately and Not With Form 1041.	Under penalties of perjury, I declare that I have examined this allocation, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.			
	Signature of fiduciary or officer representing fiduciary		Date	

For Paperwork Reduction Act Notice, see instructions. Cat. No. 64305W Form 1041-T (2024)

Form	1041-T	Allocation of Estimated Tax Payments to Beneficiaries (Under Code section 643(g)) Go to www.irs.gov/Form1041T for the latest information.	OMB No. 1545-1020	
Department of the Treasury Internal Revenue Service		For calendar year 2024 or fiscal year beginning Jan 1, 2024, and ending Dec 31, 2024	2024	
Name of trust (or decedent's estate) The Country Bank of Needham		Employer identification number 88-0724374		
Fill In Fiduciary's Name and Address Only if You Are Filing This Form Separately and Not With Form 1041.	Name and title of fiduciary Donald Paul Needham		Telephone number (optional) 5134461803	
	Number, street, and room or suite no. (If a P.O. box, see instructions.) 937 Stratford place			
	City, state, and ZIP code Mason, Ohio/Anu 45040-5060		If you are filing this form for the final year of the estate or trust, check this box ☐	
1 Total amount of estimated taxes to be allocated to beneficiaries. Enter here and on Form 1041, Schedule G, Part II, line 11 \$ 111,800,958,855.28				
2 Allocation to beneficiaries:				
(a) No.	(b) Beneficiary's name and address	(c) Beneficiary's identifying number	(d) Amount of estimated tax payment allocated to beneficiary	(e) Proration percentage
1	Donald Paul Needham		2,520,000.00	95 %
2	The Country bank of Needham		52,794,906,679.90	95 %
3	Associate Title Agency		59,003,552,175.38	95 %
4				%
5				%
6				%
7				%
8				%
9				%
10				%
3 Total from additional sheet(s)			3	
4 Total amounts allocated. (Must equal line 1, above.)			4	111,800,958,855.28
Sign Here Only if You Are Filing This Form Separately and Not With Form 1041.	Under penalties of perjury, I declare that I have examined this allocation, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.			
	Signature of fiduciary or officer representing fiduciary		Date	

☐ VOID ☐ CORRECTED			
Name, address, and ZIP code of RIC or REIT The Country bank of Needham Thecountrybankofneedham.com 45040-5060	OMB No. 1545-0123 Form 2439 (Rev. November 2021)	Notice to Shareholder of Undistributed Long-Term Capital Gains For calendar year 20 <u>24</u> , or other tax year of the regulated investment company (RIC) or the real estate investment trust (REIT) beginning <u>Jan 01</u> , 20 <u>24</u> , and ending <u>Dec 31</u> , 20 <u>24</u>	
Identification number of RIC or REIT <u>5050</u>	1a Total undistributed long-term capital gains <u>720,000,000.000</u>	Copy D For records of the regulated investment company or the real estate investment trust.	
Shareholder's identifying number <u>5060</u>	1b Unrecaptured section 1250 gain <u>273,600,000.000</u>		
Shareholder's name, address, and ZIP code Donald Needham, 937 Stratford place 45040-5060	1c Section 1202 gain <u>152,200,000.000</u>		1d Collectibles (28%) gain <u>310,000,000.000</u>
	2 Tax paid by the RIC or REIT on the box 1a gains <u>122,400,000.000</u>		
Form 2439 (Rev. 11-2021) www.irs.gov/Form2439 Department of the Treasury - Internal Revenue Service			

☐ VOID ☐ CORRECTED			
Name, address, and ZIP code of RIC or REIT The Country bank of Needham Thecountrybankofneedham.com 45040-5060	OMB No. 1545-0123 Form 2439 (Rev. November 2021)	Notice to Shareholder of Undistributed Long-Term Capital Gains For calendar year 20 <u>24</u> , or other tax year of the regulated investment company (RIC) or the real estate investment trust (REIT) beginning <u>Jan 01</u> , 20 <u>24</u> , and ending <u>Dec 31</u> , 20 <u>24</u>	
Identification number of RIC or REIT <u>5050</u>	1a Total undistributed long-term capital gains <u>720,000,000.000</u>	Copy B Attach to the shareholder's income tax return for the tax year that includes the last day of the RIC's or REIT's tax year.	
Shareholder's identifying number <u>5060</u>	1b Unrecaptured section 1250 gain <u>273,600,000.000</u>		
Shareholder's name, address, and ZIP code Donald Needham, 937 Stratford place 45040-5060	1c Section 1202 gain <u>152,200,000.000</u>		1d Collectibles (28%) gain <u>310,000.000</u>
	2 Tax paid by the RIC or REIT on the box 1a gains <u>122,400,000.000</u>		
Form 2439 (Rev. 11-2021) www.irs.gov/Form2439 Department of the Treasury - Internal Revenue Service			

☐ VOID ☐ CORRECTED				
FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number The Country bank of Needham TheCountrybankofNeedham.com 937 Stratford place mason/needham Ohio/anu 45040-5060		1 Date of closing <u>Dec 31 2024</u>	OMB No. 1545-0997 Form 1099-S (Rev. January 2022) For calendar year <u>20 24</u>	Proceeds From Real Estate Transactions
FILER'S TIN <u>920472145</u>		2 Gross proceeds <u>\$ 740,000,000,000.00</u>		
TRANSFEROR'S TIN <u>455518901</u>		3 Address (including city, state, and ZIP code) or legal description 937 Stratford Place, Mason/Needham Ohio/Anu 45040-5060		Copy C For Filer For Privacy Act and Paperwork Reduction Act Notice, see the current General Instructions for Certain Information Returns.
TRANSFEROR'S name Jordan Southerland		4 Check here if the transferor received or will receive property or services as part of the consideration ☐		
Street address (including apt. no.) 1080 Olympia Crt		5 Check here if the transferor is a foreign person (nonresident alien, foreign partnership, foreign estate, or foreign trust) ☐		
City or town, state or province, country, and ZIP or foreign postal code Mason Ohio/Anu Anu/U.s 45040-5060		6 Buyer's part of real estate tax <u>\$ 1,020,339,347,598.20</u>		
Account number (see instructions) 50243026				
Form 1099-S (Rev. 1-2022) www.irs.gov/Form1099S Department of the Treasury - Internal Revenue Service				

☐ CORRECTED (if checked)

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number The Country bank of Needham TheCountrybankofNeedham.com 937 Statford place mason/heedham Ohio/anu 45040-5060		1 Date of closing dec 31 2024	OMB No. 1545-0997 Form 1099-S (Rev. January 2022)	Proceeds From Real Estate Transactions
		2 Gross proceeds \$ 720,000,000,000.00	For calendar year 20 24	
FILER'S TIN 920472145	TRANSFEROR'S TIN 455518901	3 Address (including city, state, and ZIP code) or legal description 937 Stratford Place Mason/Needham Ohio/Anu 45040-4050		Copy B For Transferor 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 item is required to be reported and the IRS determines that it has not been reported.
TRANSFEROR'S name Jordan Southerland		4 Transferor received or will receive property or services as part of the consideration (if checked) . . . ▶ ☐		
Street address (including apt. no.) 1080 Olympia Crt		5 If checked, transferor is a foreign person (nonresident alien, foreign partnership, foreign estate, or foreign trust) ▶ ☐		
City or town, state or province, country, and ZIP or foreign postal code Mason Ohio/Anu Anu/U.s 45040-5060		6 Buyer's part of real estate tax \$ 1,020,339,347.598.20		
Account number (see instructions) 50243026				

Form 1041	Department of the Treasury—Internal Revenue Service U.S. Income Tax Return for Estates and Trusts Go to www.irs.gov/Form1041 for instructions and the latest information.	2024	OMB No. 1545-0092
A Check all that apply: ☐ Decedent's estate ☐ Simple trust ☐ Complex trust ☒ Qualified disability trust ☐ ESBT (S portion only) ☒ Grantor type trust ☐ Bankruptcy estate—Ch. 7 ☐ Bankruptcy estate—Ch. 11 ☐ Pooled income fund			
For calendar year 2024 or fiscal year beginning Jan 1, 2024, and ending December 31, 2024			
Name of estate or trust (If a grantor type trust, see the instructions.) The country bank of needham		C Employer identification number 880724374	
Name and title of fiduciary Donald Needham Director		D Date entity created 2022	
Number, street, and room or suite no. (If a P.O. box, see the instructions.) 937 Stratford Place		E Nonexempt charitable and split-interest trusts, check applicable box(es). See instructions. ☐ Described in sec. 4947(a)(1). Check here if not a private foundation ☐ ☐ Described in sec. 4947(a)(2)	
City or town, state or province, country, and ZIP or foreign postal code Mason, Ohio/Anu Anu/Us 45040-5060			
B Number of Schedules K-1 attached (see instructions)		F Check applicable boxes: ☒ Initial return ☐ Final return ☐ Amended return ☐ Net operating loss carryback ☐ Change in trust's name ☐ Change in fiduciary ☐ Change in fiduciary's name ☐ Change in fiduciary's address	
G Check here if the estate or filing trust made a section 645 election ☐ Trust TIN			
Income	1 Interest income	1	111,800,978,855.2
	2a Total ordinary dividends	2a	310,558,274,598
	b Qualified dividends allocable to: (1) Beneficiaries 111,800,978,855.2 (2) Estate or trust		
	3 Business income or (loss). Attach Schedule C (Form 1040)	3	
	4 Capital gain or (loss). Attach Schedule D (Form 1041)	4	
	5 Rents, royalties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 1040)	5	
	6 Farm income or (loss). Attach Schedule F (Form 1040)	6	
	7 Ordinary gain or (loss). Attach Form 4797	7	59,008,072,175.38
	8 Other income. List type and amount	8	
9 Total income. Combine lines 1, 2a, and 3 through 8	9	389,564,346,773.1	
Deductions	10 Interest. Check if Form 4952 is attached ☒	10	
	11 Taxes	11	7,826,088,519.88
	12 Fiduciary fees. If only a portion is deductible under section 67(e), see instructions	12	
	13 Charitable deduction (from Schedule A, line 7)	13	
	14 Attorney, accountant, and return preparer fees. If only a portion is deductible under section 67(e), see instructions	14	323,976
	15a Other deductions (attach schedule). See instructions for deductions allowable under section 67(e)	15a	
	b Net operating loss deduction. See instructions	15b	52,794,908,879.90
	16 Add lines 10 through 15b	16	60,621,299,175.78
	17 Adjusted total income or (loss). Subtract line 16 from line 9	17	308,943,047,597.1
	18 Income distribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 1041)	18	
19 Estate tax deduction including certain generation-skipping taxes (attach computation)	19	53,443,887,585.74	
20 Qualified business income deduction. Attach Form 8995 or 8995-A	20		
21 Exemption	21		
22 Add lines 18 through 21	22	53,443,887,585.74	
Tax and Payments	23 Taxable income. Subtract line 22 from line 17. If a loss, see instructions	23	255,499,160,011.5
	24 Total tax (from Schedule G, Part I, line 9)	24	
	25 Current year net 965 tax liability paid from Form 965-A, Part II, column (k) (see instructions)	25	
	26 Total payments (from Schedule G, Part II, line 19)	26	
	27 Estimated tax penalty. See instructions	27	59,008,072,175.38
	28 Tax due. If line 26 is smaller than the total of lines 24, 25, and 27, enter amount owed	28	
	29 Overpayment. If line 26 is larger than the total of lines 24, 25, and 27, enter amount overpaid	29	
	30 Amount of line 29 to be: a Credited to 2025 b Refunded	30	
Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
Paid Preparer Use Only	Signature of fiduciary or officer representing fiduciary		Date
	EIN of fiduciary if a financial institution		455518901
	Preparer's name		Preparer's signature
	Firm's name		Firm's EIN
Firm's address		Phone no.	PTIN
Dingir Firm		5134468103	
1080 Olympia Mason Ohio 45040			

For Paperwork Reduction Act Notice, see the separate instructions. Cat. No. 11370H Form **1041** (2024)

Schedule A Charitable Deduction. Don't complete for a simple trust or a pooled income fund.

1	Amounts paid or permanently set aside for charitable purposes from gross income. See instructions	1	323,976
2	Tax-exempt income allocable to charitable contributions. See instructions	2	
3	Subtract line 2 from line 1	3	
4	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes	4	323,976
5	Add lines 3 and 4	5	323,976
6	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purposes. See instructions	6	
7	Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13	7	

Schedule B Income Distribution Deduction

1	Adjusted total income. See instructions	1	
2	Adjusted tax-exempt interest	2	59,006,072,175.36
3	Total net gain from Schedule D (Form 1041), line 19, column (1). See instructions	3	
4	Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion)	4	1,209,800,000.00
5	Capital gains for the tax year included on Schedule A, line 1. See instructions	5	6,211,165,491.98
6	Enter any gain from page 1, line 4, as a negative number. If page 1, line 4, is a loss, enter the loss as a positive number	6	
7	Distributable net income. Combine lines 1 through 6. If zero or less, enter -0-	7	1,274,817,237.66
8	If a complex trust, enter accounting income for the tax year as determined under the governing instrument and applicable local law	8	
9	Income required to be distributed currently	9	
10	Other amounts paid, credited, or otherwise required to be distributed	10	
11	Total distributions. Add lines 9 and 10. If greater than line 8, see instructions	11	
12	Enter the amount of tax-exempt income included on line 11	12	
13	Tentative income distribution deduction. Subtract line 12 from line 11	13	
14	Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter -0-	14	
15	Income distribution deduction. Enter the smaller of line 13 or line 14 here and on page 1, line 18	15	

Schedule G Tax Computation and Payments (see instructions)**Part I — Tax Computation**

1	Tax:		
a	Tax on taxable income. See instructions	1a	31,055,827,459.8
b	Tax on lump-sum distributions. Attach Form 4972	1b	
c	Alternative minimum tax (from Schedule I (Form 1041), line 54)	1c	
d	Amount from Form 4255, Part I, line 3, column (q)	1d	
e	Total. Add lines 1a through 1d	1e	31,055,827,459.8
2a	Foreign tax credit. Attach Form 1116	2a	
b	General business credit. Attach Form 3800	2b	
c	Credit for prior year minimum tax. Attach Form 8801	2c	
d	Bond credits. Attach Form 8912	2d	
e	Total credits. Add lines 2a through 2d	2e	31,055,827,459.8
3	Subtract line 2e from line 1e. If zero or less, enter -0-	3	
4	Tax on the ESBT portion of the trust (from ESBT Tax Worksheet, line 17). See instructions	4	
5	Net investment income tax from Form 8960, line 21	5	
6a	Amount from Form 4255, Part I, line 3, column (r)	6a	
b	Recapture tax from Form 8611	6b	
c	Other recapture taxes:	6c	
7	Household employment taxes. Attach Schedule H (Form 1040)	7	
8	Other taxes and amounts due	8	
9	Total tax. Add lines 3 through 8. Enter here and on page 1, line 24	9	

Schedule G Tax Computation and Payments (see instructions) (continued)**Part II — Payments**

10	Current year's estimated tax payments and amount applied from preceding year's return	10	52,794,908,879.9
11	Estimated tax payments allocated to beneficiaries (from Form 1041-T)	11	111,800,958,855.2
12	Subtract line 11 from line 10	12	59,006,052,175.3
13	Tax paid with Form 7004. See instructions	13	
14	Federal income tax withheld. If any is from Form(s) 1099, check here ☒	14	389,564,348,773.1
15	Current year net 965 tax liability from Form 965-A, Part I, column (f) (see instructions)	15	
16	Payments from Form 2439	16	720,000,000,000
17	Payments from Form 4136	17	
18a	Elective payment election amount from Form 3800	18a	
b	Other credits or payments (see instructions)	18b	
19	Total payments. Add lines 12 through 18b. Enter here and on page 1, line 26	19	4,639,245,385,481

Other Information

	Yes	No
1 Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of expenses. Enter the amount of tax-exempt interest income and exempt-interest dividends \$ 0	☐	☒
2 Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement?	☒	☐
3 At any time during calendar year 2024, did the estate or trust have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country	☐	☒
4 During the tax year, did the estate or trust receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," the estate or trust may have to file Form 3520. See instructions	☐	☒
5 Did the estate or trust receive, or pay, any qualified residence interest on seller-provided financing? If "Yes," see the instructions for the required attachment	☒	☐
6 If this is an estate or a complex trust making the section 663(b) election, check here. See instructions ☐	☐	☐
7 To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here. See instructions ☐	☐	☐
8 If the decedent's estate has been open for more than 2 years, attach an explanation for the delay in closing the estate, and check here ☐	☐	☐
9 Are any present or future trust beneficiaries skip persons? See instructions	☒	☐
10 Was the trust a specified domestic entity required to file Form 8938 for the tax year? See the Instructions for Form 8938	☐	☐
11a Did the estate or trust distribute S corporation stock for which it made a section 965(i) election?	☐	☒
b If "Yes," did each beneficiary enter into an agreement to be liable for the net tax liability? See instructions	☒	☐
12 Did the estate or trust either make a section 965(i) election or enter into a transfer agreement as an eligible section 965(i) transferee for S corporation stock held on the last day of the tax year? See instructions	☒	☐
13 At any time during the tax year, did the estate or trust (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	☒	☐
14 ESBTs only. Does the ESBT have a nonresident alien grantor? If "Yes," see instructions	☒	☐
15 ESBTs only. Did the S portion of the trust claim a qualified business income deduction? If "Yes," see instructions	☒	☐

Recapture of Investment Credit

OMB No. 1545-0166

Attach to your tax return.
Go to www.irs.gov/Form4255 for instructions and the latest information.

Attachment
Sequence No. **172**

Name(s) as shown on return

The Country Bank Of Needham

Identifying number

920472145

Properties Type of property—State whether rehabilitation, energy, qualifying advanced coal project, qualifying gasification project, qualifying advanced energy project, or advanced manufacturing investment property. (See the Instructions for Form 3468 for the year the investment credit property was placed in service for definitions.) If rehabilitation property, also show type of building. If energy property, show type.

A	advanced energy project: \$ 111,800,958,855.00
B	advanced manufacturing investment property: \$ 720,000,000,000.00
C	Qualifying advanced energy project: \$ 220,805,093,321.00
D	investment credit property: \$ 82,412,106,172.00

Part I Original Investment Credit

These columns relate to the properties A through D described above		Properties			
		A	B	C	D
1	Original rate of credit	369,564,346,773.:	52,794,906,679.9	310,558,274,598	59,008,072,175.36
2	Credit base as of the end of the previous tax year (see instructions)	111,800,958,855	369,564,346,773.:	52,794,906,679.9	59,008,072,175.36
3	Net change in nonqualified nonrecourse financing during the tax year. If a net decrease, enter as a negative number	152,197,500,000	720,000,000,000	273,600,000,000	122,400,000,000
4	Credit base as of the end of the current tax year. Subtract line 3 from line 2	-40,396,541,145	350,435,653,227	220,805,093,321	63,393,927,825
5	Refigured credit (see instructions)	40,408,660,107	455,566,349,195	287,046,621,317.:	82,412,106,172
6	Credit taken for this property on Form 3800 in prior years. See instructions				

Part II Recapture From Increase in Nonqualified Nonrecourse Financing (see instructions)

7	Credit subject to recapture due to a net increase in nonqualified nonrecourse financing. Subtract line 5 from line 6. If zero or less, enter -0-	40,408,660,107	455,566,349,195	287,046,621,317.:	82,412,106,172
8	Unused general business credits that would have been allowed if original credit had been figured with current-year credit base (see instructions)	60,621,299,175	60,621,299,175	60,621,299,175	60,621,299,175
9	Subtract line 8 from line 7. This is the recapture tax as a result of a net increase in nonqualified nonrecourse financing	21,790,806,997	394,945,050,020	226,425,322,142.:	21,790,806,997

Part III Recapture From Disposition of Property or Cessation of Use as Investment Credit Property

10	Date property was placed in service	94		1,135,018,158,346	664,951,986,156
11	Date property ceased to be qualified investment credit property	2000			
12	Number of full years between the date on line 10 and the date on line 11	30			
13	Unused general business credits that would have been allowed had there been no credit from this property (see instructions)	60,621,299,175.71	60,621,299,175.71	60,621,299,175.71	60,621,299,175.71
14	Subtract line 13 from line 6	60,621,299,175.71	60,621,299,175.71	60,621,299,175.71	60,621,299,175.71
15	Recapture percentage (see instructions)	30%	30%	30%	30%
16	Multiply line 14 by the percentage on line 15	18,186,389,752.7:	18,186,389,752.7:	18,186,389,752.7:	18,186,389,752
17	Add property columns A through D, line 9				1,799,970,144,504
18	Add property columns A through D, line 16				1,207,763,717,356
19	Reserved for future use				
20	Total increase in tax. Add lines 17 and 18. Enter here and on the appropriate line of your tax return				3,007,733,861,860

For Paperwork Reduction Act Notice, see separate instructions.

Cat. No. 41488C

Form **4255** (Rev. 12-2023)

SCHEDULE C
(Form 1040)

Profit or Loss From Business
(Sole Proprietorship)

OMB No. 1545-0074

2024

Department of the Treasury
Internal Revenue Service

Attach to Form 1040, 1040-SR, 1040-SS, 1040-NR, or 1041; partnerships must generally file Form 1065.
Go to www.irs.gov/ScheduleC for instructions and the latest information.

Attachment
Sequence No. 09

Name of proprietor Donald P. Needham	Social security number (SSN) 287848777
A Principal business or profession, including product or service (see instructions) Associate Title Agency Government and/or (Currency)	B Enter code from Instructions 4 5 4 2 2
C Business name. If no separate business name, leave blank. DONALD PAUL NEEDHAM	D Employer ID number (EIN) (see Instr.) 8 8 0 7 2 4 3 7 4
E Business address (including suite or room no.) City, town or post office, state, and ZIP code Mason/Needham Post Masters, Ohio/Anu 46040-5060	
F Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify)	
G Did you "materially participate" in the operation of this business during 2024? If "No," see instructions for limit on losses	☒ Yes ☐ No
H If you started or acquired this business during 2024, check here	☐
I Did you make any payments in 2024 that would require you to file Form(s) 1099? See instructions	☐ Yes ☐ No
J If "Yes," did you or will you file required Form(s) 1099?	☐ Yes ☐ No

Part I Income

1 Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked ☒	1	5,765,619,552,594
2 Returns and allowances	2	35,767,281,334
3 Subtract line 2 from line 1	3	
4 Cost of goods sold (from line 42)	4	1,076,778,685,889
5 Gross profit. Subtract line 4 from line 3	5	1,076,778,685,889
6 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)	6	
7 Gross income. Add lines 5 and 6	7	1,076,778,685,889

Part II Expenses. Enter expenses for business use of your home only on line 30.

8 Advertising	8	8,888,999,378	18 Office expense (see instructions)	18	88,685,399
9 Car and truck expenses (see instructions)	9	657,887,889	19 Pension and profit-sharing plans	19	5,875,991
10 Commissions and fees	10	75,993,449	20 Rent or lease (see instructions):		
11 Contract labor (see instructions)	11	98,224,456	a Vehicles, machinery, and equipment	20a	5,399,443,958
12 Depletion	12	892,334,556	b Other business property	20b	
13 Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	13	17,892,334,556	21 Repairs and maintenance	21	75,293
14 Employee benefit programs (other than on line 19)	14		22 Supplies (not included in Part III)	22	6,443,229
15 Insurance (other than health)	15	3,886,496	23 Taxes and licenses	23	1,076,778,685,889
16 Interest (see instructions):			24 Travel and meals:		
a Mortgage (paid to banks, etc.)	16a	1,257,317,229,559	a Travel	24a	418,288,399
b Other	16b		b Deductible meals (see instructions)	24b	
17 Legal and professional services	17	25,485,499	25 Utilities	25	4,928,345
28 Total expenses before expenses for business use of home. Add lines 8 through 27b	28		26 Wages (less employment credits)	26	16,002,345
29 Tentative profit or (loss). Subtract line 28 from line 7	29		27a Other expenses (from line 48)	27a	
30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions. Simplified method filers only: Enter the total square footage of (a) your home: and (b) the part of your home used for business: Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30	30		b Energy efficient commercial bldgs deduction (attach Form 7205)	27b	
31 Net profit or (loss). Subtract line 30 from line 29. • If a profit, enter on both Schedule 1 (Form 1040), line 3, and on Schedule SE, line 2. (If you checked the box on line 1, see instructions.) Estates and trusts, enter on Form 1041, line 3. • If a loss, you must go to line 32.	31				
32 If you have a loss, check the box that describes your investment in this activity. See instructions. • If you checked 32a, enter the loss on both Schedule 1 (Form 1040), line 3, and on Schedule SE, line 2. (If you checked the box on line 1, see the line 31 instructions.) Estates and trusts, enter on Form 1041, line 3. • If you checked 32b, you must attach Form 6198. Your loss may be limited.			32a ☐ All investment is at risk.		
			32b ☐ Some investment is not at risk.		

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 11334P

Schedule C (Form 1040) 2024

Part III Cost of Goods Sold (see instructions)

33	Method(s) used to value closing inventory:	a ☒ Cost	b ☐ Lower of cost or market	c ☐ Other (attach explanation)
34	Was there any change in determining quantities, costs, or valuations between opening and closing inventory?	☐ Yes ☒ No		
If "Yes," attach explanation				
35	Inventory at beginning of year. If different from last year's closing inventory, attach explanation	35		
36	Purchases less cost of items withdrawn for personal use	36		
37	Cost of labor. Do not include any amounts paid to yourself	37	8,300,000	
38	Materials and supplies	38	53,009,888	
39	Other costs	39	759,634	
40	Add lines 35 through 39	40		
41	Inventory at end of year	41	5,765,619,552,594	
42	Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on line 4	42		

Part IV Information on Your Vehicle. Complete this part **only** if you are claiming car or truck expenses on line 9 and are not required to file Form 4562 for this business. See the instructions for line 13 to find out if you must file Form 4562.

43	When did you place your vehicle in service for business purposes? (month/day/year)	01 / 01 / 2000
44	Of the total number of miles you drove your vehicle during 2024, enter the number of miles you used your vehicle for:	
a	Business	167,888
b	Commuting (see instructions)	351,857
c	Other	
45	Was your vehicle available for personal use during off-duty hours?	☒ Yes ☐ No
46	Do you (or your spouse) have another vehicle available for personal use?.	☒ Yes ☐ No
47a	Do you have evidence to support your deduction?	☒ Yes ☐ No
b	If "Yes," is the evidence written?	☒ Yes ☐ No

Part V Other Expenses. List below business expenses not included on lines 8–26, line 27b, or line 30.

48	Total other expenses. Enter here and on line 27a

Schedule K-1
(Form 1065)

Department of the Treasury
Internal Revenue Service

2024

For calendar year 2024, or tax year

beginning 01 / 01 / 2024 ending 12 / 31 / 2024

Partner's Share of Income, Deductions,
Credits, etc.

See separate instructions.

☐ Final K-1 ☒ Amended K-1

651123
OMB No. 1545-0123

Part III Partner's Share of Current Year Income,
Deductions, Credits, and Other Items

1	Ordinary business income (loss)	425,797,500,000	14	Self-employment earnings (loss)	483,499
2	Net rental real estate income (loss)	35,769			
3	Other net rental income (loss)	34,998	15	Credits	1,799,970,144,504
4a	Guaranteed payments for services	720,005,000,000			
4b	Guaranteed payments for capital	1,799,970,144,504	16	Schedule K-3 is attached if checked	☒
4c	Total guaranteed payments	3,007,733,861,862	17	Alternative minimum tax (AMT) items	
5	Interest income	273,600,000,000			
6a	Ordinary dividends	720,005,000,000			
6b	Qualified dividends	\$648,980,905.84	18	Tax-exempt income and nondeductible expenses	
6c	Dividend equivalents				
7	Royalties				
8	Net short-term capital gain (loss)		19	Distributions	
9a	Net long-term capital gain (loss)				
9b	Collectibles (28%) gain (loss)		20	Other information	
9c	Unrecaptured section 1250 gain	410,000,000,000			
10	Net section 1231 gain (loss)				
11	Other income (loss)				
12	Section 179 deduction		21	Foreign taxes paid or accrued	
13	Other deductions				

Part I Information About the Partnership

A Partnership's employer identification number
92-0472145

B Partnership's name, address, city, state, and ZIP code
The Country bank of Needham
937 Stratford Place, mason/needham Ohio/anu 45040-5060

C IRS center where partnership filed return:

D ☐ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's SSN or TIN (Do not use TIN of a disregarded entity. See instructions.)
287848777

F Name, address, city, state, and ZIP code for partner entered in E. See instructions.
Donald Paul needham
937 Stratford place, mason/needham ohio/anu 45040-5060

G ☐ General partner or LLC member-manager ☐ Limited partner or other LLC member

H1 ☒ Domestic partner ☐ Foreign partner

H2 ☐ If the partner is a disregarded entity (DE), enter the partner's:
TIN Name

I1 What type of entity is this partner?

I2 If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here ☐

J Partner's share of profit, loss, and capital (see instructions):

	Beginning		Ending	
Profit	273,600,000,000	%	262,200,000,000	%
Loss	122,400,000,000	%	122,400,000,000	%
Capital	310,000,000,000	%	720,000,000,000	%

Check if decrease is due to:
☒ Sale or ☐ Exchange of partnership interest. See instructions.

K1 Partner's share of liabilities:

	Beginning		Ending	
Nonrecourse	\$		\$	
Qualified nonrecourse financing	\$		\$	
Recourse	\$ 210,000,000,000		\$ 110,000,000,000	

K2 Check this box if item K1 includes liability amounts from lower-tier partnerships ☐

K3 Check if any of the above liability is subject to guarantees or other payment obligations by the partner. See instructions ☐

L Partner's Capital Account Analysis

Beginning capital account	\$ 310,000,000,000
Capital contributed during the year	\$ 122,400,000,000
Current year net income (loss)	\$ 122,400,000,000
Other increase (decrease) (attach explanation)	\$
Withdrawals and distributions	\$ ()
Ending capital account	\$ 720,000,000,000

M Did the partner contribute property with a built-in gain (loss)?
☐ Yes ☒ No If "Yes," attach statement. See instructions.

N Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)

Beginning	\$
Ending	\$

For IRS Use Only

22 ☐ More than one activity for at-risk purposes*

23 ☒ More than one activity for passive activity purposes*

*See attached statement for additional information.

Form **8949****Sales and Other Dispositions of Capital Assets**

OMB No. 1545-0074

Department of the Treasury
Internal Revenue ServiceFile with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.
Go to www.irs.gov/Form8949 for instructions and the latest information.**2024**
Attachment
Sequence No. **12A**Name(s) shown on return
Donald Paul NeedhamSocial security number or taxpayer identification number
287848777

Before you check Box A, B, or C 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 I **Short-Term.** Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term transactions, see page 2.

Note: You may aggregate all short-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 1a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-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.

- ☐ **(A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
☐ **(B)** Short-term transactions reported on Form(s) 1099-B showing basis **wasn't** reported to the IRS
☐ **(C)** Short-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 Column (g) 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 or adjustment	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	12/31/2024	488,600,000.00	4800		488,599,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	12/31/2024	86,400,000.000	4800		86,399,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	01/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	02/29/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	03/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	04/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	05/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	06/29/2024	40,800,067,200	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	07/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	08/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	09/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	10/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	11/30/2024	40,800,000.000	4800		40,799,995,200	
	Purchase Sale value date to purchase public shares XYZ Co.	12/01/2023	12/30/2024	40,800,000.000	4800		40,799,995,200	
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 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked).							

Note: If you checked Box A 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.

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

Cat. No. 37788Z

Form **8949** (2024)

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

Donald Paul Needham

287848777

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 9849, 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

[illegible]

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.

☐ VOID ☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Associate Title Agency [Chris M V S] 937 Stratford Place Mason/Needham Ohio/Anu 45040-1044 / 5060		FILER'S TIN 455518901	OMB No. 1545-2205	Payment Card and Third Party Network Transactions	
		PAYEE'S TIN 984-87-9983	Form 1099-K (Rev. March 2024)		
		1a Gross amount of payment card/third party network transactions \$ 4,007,733,861,862	For calendar year 2024		
Check to indicate if FILER is a (an): Payment settlement entity (PSE) ☐ Electronic Payment Facilitator (EPF)/Other third party ☐		Check to indicate transactions reported are: Payment card ☒ Third party network ☐	1b Card Not Present transactions \$	2 Merchant category code 99995	Copy 1 For State Tax Department
		3 Number of payment transactions 500	4 Federal income tax withheld \$ 300,773,386,186		
PAYEE'S name The Country Bank Of Needham		5a January \$ 445,303,762,429	5b February \$ 445,303,762,429		
Street address (including apt. no.) 1080 Oylimpia Drive		5c March \$ 445,303,762,429	5d April \$ 601,546,772,372		
City or town, state or province, country, and ZIP or foreign postal code Needham, Anu/Ohio Anu/U.s 45040-5060		5e May \$ 445,303,762,429	5f June \$ 445,303,762,429		
PSE'S name and telephone number Christopher Markus Von Schmitt		5g July \$ 445,303,762,429	5h August \$ 12,030,935,447		
		5i September \$ 445,303,762,429	5j October \$ 445,303,762,429		
		5k November \$ 445,303,762,429	5l December \$ 445,303,762,429		
Account number (see instructions) 39548794		6 State Ohio	7 State identification no. 43845	8 State income tax withheld \$ 1202320158558	
		Anu	7557224454439	\$	

Form **1099-K** (Rev. 3-2024)

www.irs.gov/Form1099K

Department of the Treasury - Internal Revenue Service

☐ VOID ☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. The Country Bank Of Needham Thecountrybankofneedham.com 937 Stratford Place Mason Ohio 45040-5060		FILER'S TIN 920724374	OMB No. 1545-2205	Payment Card and Third Party Network Transactions	
		PAYEE'S TIN 953-91-5896	Form 1099-K (Rev. March 2024)		
		1a Gross amount of payment card/third party network transactions \$ 776,085,128,221	For calendar year 2024		
Check to indicate if FILER is a (an): Payment settlement entity (PSE) ☐ Electronic Payment Facilitator (EPF)/Other third party ☐		Check to indicate transactions reported are: Payment card ☒ Third party network ☐	1b Card Not Present transactions \$ 0	2 Merchant category code 99999	Copy 1 For State Tax Department
		3 Number of payment transactions 289	4 Federal income tax withheld \$ 36,956,434,677		
PAYEE'S name State Of Ohio		5a January \$ 106,905,726,437,305	5b February \$ 97,010,641,027,625		
Street address (including apt. no.) 3850 OH-73,		5c March \$ 97,010,641,027,625	5d April \$ 169,999,599,515		
City or town, state or province, country, and ZIP or foreign postal code Peebles, OH 45660		5e May \$ 97,010,641,027,625	5f June \$ 97,010,641,027,625		
PSE'S name and telephone number Albert Demetries Symentarian		5g July \$ 97,010,641,027,625	5h August \$ 36,956,434,677		
		5i September \$ 97,010,641,027,625	5j October \$ 97,010,641,027,625		
		5k November \$ 97,010,641,027,625	5l December \$ 29,565,147,741.84		
Account number (see instructions) 42000258		6 State Ohio	7 State identification no. 43823	8 State income tax withheld \$ 9,909,726,437,305	
		Anu	755724454441	\$ 990,972,643,730	

Form **1099-K** (Rev. 3-2024)

www.irs.gov/Form1099K

Department of the Treasury - Internal Revenue Service

☐ VOID ☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. The country bank of needham 937 stratford place Needham/Mason Anu/Ohio 45050-5060 anor 1044		FILER'S TIN 880724374	OMB No. 1545-2205	
		PAYEE'S TIN 927-92-2639	Form 1099-K (Rev. March 2024)	
		1a Gross amount of payment card/third party network transactions \$	For calendar year 2024	
		1b Card Not Present transactions \$ 4,978,600,072,000	2 Merchant category code 999995	Copy 1 For State Tax Department
Check to indicate if FILER is a (an): Payment settlement entity (PSE) ☐ Electronic Payment Facilitator (EPF)/Other third party ☐		3 Number of payment transactions 4 Federal income tax withheld \$ 497,860,007,200		
Check to indicate transactions reported are: Payment card ☒ Third party network ☐				
PAYEE'S name Donald Paul needham		5a January \$ 553,177,785,777.77		
Street address (including apt. no.) The country bank of needham.com		5b February \$ 553,177,785,777.77	5c March \$ 553,177,785,777.77	5d April \$ 398,288,005,760
City or town, state or province, country, and ZIP or foreign postal code Mason, Anu/Ohio Anu/U.S 45040-5060		5e May \$ 553,177,785,777.77	5f June \$ 553,177,785,777.77	5g July \$ 553,177,785,777.77
PSE'S name and telephone number Jordan Southerland		5h August \$ 99,572,001,440	5i September \$ 553,177,785,777.77	5j October \$ 553,177,785,777.77
Account number (see instructions) 74115454		5k November \$ 553,177,785,777.77	5l December \$ 553,177,785,777.77	
		6 State Ohio	7 State identification no. sva95-eb1	8 State income tax withheld \$ 1,493,580,021,600
		Anu	75445449384533	\$ 2,500,000

Schedule K-1
(Form 1065)
Department of the Treasury
Internal Revenue Service

2022

For calendar year 2022, or tax year

beginning 01 / 01 / 2022 ending 12 / 29 / 2023

Partner's Share of Income, Deductions,
Credits, etc.

See separate instructions.

Part I Information About the Partnership

A Partnership's employer identification number
880724374

B Partnership's name, address, city, state, and ZIP code
Donald Paul Needham
1080 Olympia Court Mason Ohio/Needham 45040-5060

C IRS center where partnership filed return:

D ☐ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's SSN or TIN (Do not use TIN of a disregarded entity. See instructions.)
455518901

F Name, address, city, state, and ZIP code for partner entered in E. See instructions.
The Regional Financial Center
associatetitleagency.thecountrybankofneedham.com
937 Stratford Pl, Mason Ohio 45040-5060

G ☐ General partner or LLC member-manager ☐ Limited partner or other LLC member

H1 ☒ Domestic partner ☐ Foreign partner

H2 ☐ If the partner is a disregarded entity (DE), enter the partner's:
TIN Name

H What type of entity is this partner?

I If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here ☐

J Partner's share of profit, loss, and capital (see instructions):

	Beginning		Ending	
Profit	298,581,821,133	%	460,774,415,329	%
Loss		%		%
Capital	829,393,947,593	%	1,658,787,895,186	%

Check if decrease is due to sale or exchange of partnership interest ☐

K Partner's share of liabilities:

	Beginning		Ending	
Nonrecourse		\$		\$
Qualified nonrecourse financing		\$		\$
Recourse	456,915,948,591	\$	1,256,345,945,331	\$

Check this box if item K includes liability amounts from lower-tier partnerships ☐

L Partner's Capital Account Analysis

Beginning capital account	\$ 721,435,958,561
Capital contributed during the year	\$ 200,122,839,334
Current year net income (loss)	\$
Other increase (decrease) (attach explanation)	\$
Withdrawals and distributions	\$ ()
Ending capital account	\$ 1,399,345,945,331

M Did the partner contribute property with a built-in gain (loss)?
☐ Yes ☐ No If "Yes," attach statement. See instructions.

N Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)
Beginning \$
Ending \$

☐ Final K-1 ☐ Amended K-1

651121
OMB No. 1545-0123

Part III Partner's Share of Current Year Income,
Deductions, Credits, and Other Items

1 Ordinary business income (loss)	15,299,459	14 Self-employment earnings (loss)	
2 Net rental real estate income (loss)			
3 Other net rental income (loss)	345,200,399	15 Credits	1,658,787,895,186
4a Guaranteed payments for services	219,393,947,593		
4b Guaranteed payments for capital	619,393,947,593	16 Schedule K-3 is attached if checked ☐	
4c Total guaranteed payments	658,787,895,186	17 Alternative minimum tax (AMT) items	
5 Interest income	460,774,415,329		
6a Ordinary dividends	1,658,787,895,186		
6b Qualified dividends		18 Tax-exempt income and nondeductible expenses	
6c Dividend equivalents			
7 Royalties			
8 Net short-term capital gain (loss)			
9a Net long-term capital gain (loss)		19 Distributions	
9b Collectibles (28%) gain (loss)			
9c Unrecaptured section 1250 gain		20 Other information	
10 Net section 1231 gain (loss)			
11 Other income (loss)			
12 Section 179 deduction		21 Foreign taxes paid or accrued	
13 Other deductions			
22 ☐ More than one activity for at-risk purposes*			
23 ☐ More than one activity for passive activity purposes*			

*See attached statement for additional information.

For IRS Use Only

Donald Needham, 937 Stratford place 45040-5060