



Tax Debt *Negotiation* and *Resolution*

IRS Transcript Reports

for

JOHN DOE

Prepared on Aug 02, 2022
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Income Tax Liability Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**
 Taxpayer SSN: **XXX-XX-1234**

Period	Tax Assessed	Failure to File Penalties	Failure to Pay Penalties	Other Penalties	Interest	Total Tax Liability	Withholdings, Payments, Credits, Write-offs	Refunds	Unpaid Assessed Balance	Current Tax Due
2010	\$3,295.00	\$0.00	\$112.58	\$0.00	\$85.75	\$3,493.33	(\$3,493.33)	\$0.00	\$0.00	\$0.00
2011	\$4,762.00	\$0.00	\$1,074.97	\$80.00	\$826.37	\$6,743.34	(\$6,743.34)	\$0.00	\$0.00	\$0.00
2012	\$4,713.00	\$0.00	\$321.34	\$85.00	\$312.50	\$5,431.84	(\$5,431.84)	\$0.00	\$0.00	\$0.00
2013	\$11,301.00	\$0.00	\$1,250.61	\$1,181.57	\$1,883.71	\$15,616.89	(\$10,811.91)	\$0.00	\$1,675.90	\$4,804.98
2014	\$7,439.00	\$0.00	\$1,709.24	\$117.00	\$2,769.86	\$12,035.10	(\$602.00)	\$0.00	\$7,353.37	\$11,433.10
2015	\$118,606.00	\$0.00	\$10,885.23	\$39,834.47	\$43,686.42	\$213,012.12	\$0.00	\$0.00	\$140,423.11	\$213,012.12
2016	\$7,543.00	\$1,697.17	\$452.58	\$1,693.16	\$2,430.19	\$13,816.10	\$0.00	\$0.00	\$10,193.77	\$13,816.10
2017	\$532.00	\$210.00	\$26.60	\$0.00	\$26.65	\$795.25	(\$795.25)	\$0.00	\$0.00	\$0.00
2018	\$5,680.00	\$542.00	\$65.00	\$520.82	\$491.97	\$7,299.79	(\$3,733.92)	\$0.00	\$2,878.66	\$3,565.87
2019	\$3,263.00	\$0.00	\$22.89	\$95.63	\$14.44	\$3,395.96	(\$3,383.90)	\$0.00	\$0.00	\$12.06
2020	\$861.00	\$0.00	\$0.00	\$0.00	\$3.48	\$864.48	(\$2,664.48)	\$1,800.00	\$0.00	\$0.00
2021	\$489.00	\$0.00	\$0.00	\$0.00	\$2.80	\$491.80	(\$1,891.79)	\$1,400.00	\$0.00	\$0.01
Total	\$168,484.00	\$2,449.17	\$15,921.04	\$43,607.65	\$52,534.14	\$282,996.00	(\$39,551.76)	\$3,200.00	\$162,524.81	\$246,644.24

Compliance Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**
 Taxpayer SSN: **XXX-XX-1234**

Period	Return Filed	Filing Date	Filing Status	Collection Status	Lien Filed	CDP Notice of Intent To Levy	Audit	Installment Agreement	Offer in Compromise	Bankruptcy or Other Legal Action
2010	Yes	11/21/2011	Single	-	-	-	-	Terminated on 09/17/2012	-	-
2011	Yes	07/02/2012	Single	Blocked since 03/06/2017	Yes	Issued on 04/09/2013	-	Pending since 03/07/2018	-	-
2012	Yes	07/29/2013	Single	Active since 09/18/2017	Yes	Issued on 09/18/2017	-	Pending since 03/07/2018	-	-
2013	Yes	08/18/2014	Single	Active since 10/21/2019	Yes	Issued on 09/18/2017	Closed on 03/22/2021	Pending since 03/07/2018	-	-
2014	Yes	11/23/2015	Head of Household	Active since 10/14/2019	Yes	Issued on 09/18/2017	-	Pending since 03/07/2018	-	-
2015	Yes	11/07/2016	Head of Household	Active since 10/14/2019	Yes	Issued on 09/18/2017, 08/28/2018	Active since 01/29/2021	Pending since 03/07/2018	-	-
2016	Yes	03/26/2018	Single	Active since 10/14/2019	Yes	Issued on 08/28/2018	-	Pending since 03/07/2018	-	-
2017	Yes	02/25/2019	Married Filing Separate	-	-	-	-	-	-	-
2018	Yes	07/15/2019	Married Filing Separate	Blocked since 02/15/2021	-	-	Active since 10/27/2020	-	-	-
2019	Yes	12/21/2020	Married Filing Separate	-	-	-	-	-	-	-
2020	Yes	07/05/2021	Married Filing Separate	-	-	-	-	-	-	-
2021	Yes	06/06/2022	Married Filing Separate	-	-	-	-	-	-	-

Estimated CSED (Collection Statute Expiration Date) Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**
 Taxpayer SSN: **XXX-XX-1234**

Period	Code	Assessment Event	Amount	Assessment Date	Tolling Events (Statute stops running during this period)				# of Tolling Days	Unpaid Amount	Estimated CSED
					Start Event	Start Date	End Event	End Date			
2010	150	Tax return filed	\$3,295.00	11/21/2011	No tolling events				-	-	11/22/2021
2011	150	Tax return filed	\$4,762.00	07/02/2012	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	167	-	12/17/2022
2012	150	Tax return filed	\$4,713.00	07/29/2013	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	167	-	01/13/2024
	170	Penalty for not pre-paying tax 04-11-2024	\$85.00	07/29/2013	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	167	-	01/13/2024
2013	150	Tax return filed	\$5,872.00	08/18/2014	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	-	03/04/2025
	170	Penalty for not pre-paying tax 04-02-2025	\$94.00	08/18/2014	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	-	03/04/2025
	290	Additional tax assessed 09-30-2026	\$5,429.00	02/15/2016	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	\$590.20	09/01/2026
	240	Miscellaneous penalty IRC 6662(c), (d), (e), (f), (g), or (h) Accuracy-Related Penalty 09-30-2026	\$1,086.00	02/15/2016	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	\$1,086.00	09/01/2026

Period	Code	Assessment Event	Amount	Assessment Date	Tolling Events (Statute stops running during this period)				# of Tolling Days	Unpaid Amount	Estimated CSED
					Start Event	Start Date	End Event	End Date			
2014	150	Tax return filed	\$7,439.00	11/23/2015	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	\$6,837.00	06/09/2026
	170	Penalty for not pre-paying tax 06-08-2026	\$117.00	11/23/2015	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	\$117.00	06/09/2026
2015	150	Tax return filed	\$14,349.00	11/07/2016	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	\$14,349.00	05/24/2027
	176	Penalty for not pre-paying tax 05-23-2027	\$136.81	11/07/2016	971, Pending installment agreement	03/07/2018	972, Removed installment agreement	08/21/2018	197	\$136.81	05/24/2027
	300	Additional tax assessed by examination 08-21-2028	\$104,257.00	04/16/2018	971, Pending installment agreement	04/16/2018*	972, Removed installment agreement	08/21/2018	157	\$104,257.00	09/21/2028
	240	Miscellaneous penalty 08-21-2028	\$20,851.40	04/16/2018	971, Pending installment agreement	04/16/2018*	972, Removed installment agreement	08/21/2018	157	\$20,851.40	09/21/2028
2016	150	Tax return filed	\$7,543.00	03/26/2018	971, Pending installment agreement	03/26/2018*	972, Removed installment agreement	08/21/2018	178	\$7,543.00	09/21/2028
	166	Penalty for filing tax return after the due date 08-21-2028	\$1,697.17	03/26/2018	971, Pending installment agreement	03/26/2018*	972, Removed installment agreement	08/21/2018	178	\$1,697.17	09/21/2028
	170	Penalty for not pre-paying tax 08-21-2028	\$180.00	03/26/2018	971, Pending installment agreement	03/26/2018*	972, Removed installment agreement	08/21/2018	178	\$180.00	09/21/2028
2017	150	Tax return filed	\$532.00	02/25/2019	No tolling events				-	-	02/26/2029

Period	Code	Assessment Event	Amount	Assessment Date	Tolling Events (Statute stops running during this period)				# of Tolling Days	Unpaid Amount	Estimated CSED
					Start Event	Start Date	End Event	End Date			
	166	Penalty for filing tax return after the due date 02-25-2029	\$210.00	02/25/2019	No tolling events				-	-	02/26/2029
2018	150	Tax return filed	\$2,600.00	07/15/2019	No tolling events				-	-	07/16/2029
	166	Penalty for filing tax return after the due date 07-15-2029	\$234.00	07/15/2019	No tolling events				-	-	07/16/2029
	170	Penalty for not pre-paying tax 07-15-2029	\$19.00	07/15/2019	No tolling events				-	-	07/16/2029
	290	Additional tax assessed 10-26-2030	\$3,080.00	10/26/2020	No tolling events				-	\$2,240.60	10/27/2030
	160	Penalty for filing tax return after the due date 10-26-2030	\$308.00	10/26/2020	No tolling events				-	\$308.00	10/27/2030
2019	150	Tax return filed	\$3,263.00	12/21/2020	No tolling events				-	-	12/22/2030
	170	Penalty for not pre-paying tax 12-21-2030	\$88.00	12/21/2020	No tolling events				-	-	12/22/2030
2020	150	Tax return filed	\$861.00	07/05/2021	No tolling events				-	-	07/06/2031
2021	150	Tax return filed	\$489.00	06/06/2022	No tolling events				-	-	06/07/2032
Total			\$193,590.38							\$160,193.18**	

*Tax assessed after the start of tolling event, therefore tolling starts from the assessment date.

**This report does not include interest assessments and penalties/interest accruals; that's why total unpaid amount may differ from the Total Current Tax Due in the Income Tax Liability report.

First Time Penalty Abatement Eligibility Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**

Taxpayer SSN: **XXX-XX-1234**

Period	Return Filed	Tax Assessed	Failure to File Penalties (FTF)	Failure to Pay Penalties (FTP)	Other Penalties	Total FTF & FTP Penalties	First Time Abatement (FTA) Eligibility	Potential Abatement
2010	Yes	\$3,295.00	-	\$112.58	-	\$112.58		
2011	Yes	\$4,762.00	-	\$1,074.97	\$80.00	\$1,074.97		
2012	Yes	\$4,713.00	-	\$321.34	-	\$321.34		
2013	Yes	\$11,301.00	-	\$1,250.61	\$1,086.00	\$1,250.61		
2014	Yes	\$7,439.00	-	\$1,709.24	-	\$1,709.24		
2015	Yes	\$118,606.00	-	\$10,885.23	\$20,931.40	\$10,885.23		
2016	Yes	\$7,543.00	\$1,697.17	\$452.58	\$80.00	\$2,149.75		
2017	Yes	\$532.00	\$210.00	\$26.60	-	\$236.60		
2018	Yes	\$5,680.00	\$542.00	\$65.00	-	\$607.00		
2019	Yes	\$3,263.00	-	\$22.89	-	\$22.89		
2020	Yes	\$861.00	-	-	-	-		
2021	Yes	\$489.00	-	-	-	-		
Total		\$168,484.00	\$2,449.17	\$15,921.04	\$22,177.40	\$18,370.21		\$0.00

Bankruptcy Dischargeability Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**
 Taxpayer SSN: **XXX-XX-1234**

Period	Type of Claim	Substitute for Return Filed	Fraud Penalty	Lien Filed	Due Date Including Extension (if any)	Due or Filing Date	Assessment Date	3-Year Rule Date	2-Year Rule Date	240-Day Rule Date	Estimated Earliest Date for Filing Bankruptcy Petition	Dischargeable Amount (Now / Later)	Estimated CSED
2010	Unsecured Non-Priority	No	No	No	10/17/2011	10/17/2011	11/21/2011	10/18/2014	10/18/2013	07/19/2012	10/18/2014	-	11/22/2021
2011	Secured Non-Priority	No	No	Yes ¹	10/15/2012	05/29/2012	07/02/2012	10/16/2015	05/30/2014	02/28/2013	10/16/2015	-	12/17/2022
2012	Secured Non-Priority	No	No	Yes ¹	10/15/2013	06/24/2013	07/29/2013	10/16/2016	06/25/2015	03/27/2014	10/16/2016	-	01/13/2024
2013	Secured Non-Priority	No	No	Yes ¹	10/15/2014	07/14/2014	02/15/2016	10/16/2017	07/15/2016	10/13/2016	10/16/2017	\$4,804.98	09/01/2026
2014	Secured Non-Priority	No	No	Yes ¹	10/15/2015	10/14/2015	11/23/2015	10/16/2018	10/15/2017	07/21/2016	10/16/2018	\$11,433.10	06/09/2026
2015	Secured Non-Priority	No	No	Yes ¹	10/17/2016	10/04/2016	04/16/2018	10/18/2019	10/05/2018	12/13/2018	10/18/2019	\$213,012.12	09/21/2028
2016	Secured Non-Priority	No	No	Yes ¹	10/16/2017	03/04/2018 ⁶	03/26/2018	10/17/2020	03/05/2020	11/22/2018	10/17/2020	\$13,816.10	09/21/2028
2017	Unsecured Non-Priority	No	No	No	10/15/2018	02/03/2019	02/25/2019	10/16/2021	02/04/2021	10/24/2019	10/16/2021	-	02/26/2029
2018	Unsecured Non-Priority	No	No	No	04/15/2019	06/05/2019 ⁶	10/26/2020	04/16/2022	06/06/2021	06/24/2021	04/16/2022	\$3,565.87	10/27/2030
2019	Unsecured Priority	No	No	No	10/15/2020	10/08/2020	12/21/2020	10/16/2023	10/09/2022	08/19/2021	10/16/2023	\$12.06	12/22/2030
2020	Unsecured Priority	No	No	No	04/15/2021	04/24/2021	07/05/2021	04/16/2024	04/25/2023	03/03/2022	04/16/2024	-	07/06/2031

Period	Type of Claim	Substitute for Return Filed	Fraud Penalty	Lien Filed	Due Date Including Extension (if any)	Due or Filing Date	Assessment Date	3-Year Rule Date	2-Year Rule Date	240-Day Rule Date	Estimated Earliest Date for Filing Bankruptcy Petition	Dischargeable Amount (Now / Later)	Estimated CSED
2021	Unsecured Priority	No	No	No	04/18/2022	04/15/2022	06/06/2022	04/19/2025	04/16/2024	02/02/2023	04/19/2025	\$0.01	06/07/2032
Total												\$246,632.17 \$12.07	

¹ Secured Debt - Lien will survive bankruptcy until collection statute expires, see Estimated CSED column.

⁶ Since original tax return was filed late, tax and interest may not be dischargeable, if tax return fails [the "Beard Test"](#). However, penalties imposed with respect to a transaction or event that occurred 3 years before the date of filing bankruptcy petition are dischargeable, see 11 U.S. Code §523(a)(7)(B).

Disclosures:

- Criminal tax fraud indicators are not reflected on IRS Transcripts and therefore, are beyond the scope of this report. If your client is convicted or pled guilty to criminal tax fraud or willful attempt to evade or defeat any tax or payment thereof for any tax period(s) in this report, such tax period(s) is(are) not ELIGIBLE for Bankruptcy.
- In cases where IRS was not listed as a creditor, prior bankruptcies would not be shown on IRS Transcripts, and therefore, would not be reflected in calculations. It is highly recommended searching for prior bankruptcies using PACER system at <http://pacer.gov>

Account Transcript Summary Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**
 Taxpayer SSN: **XXX-XX-1234**

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)	
2010	01	Single	(\$38,491.00)	\$0.00	\$3,295.00	\$21,536.00	\$0.00	\$3,295.00	10/17/2011	
Transactions										
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>	
	460	Extension of time to file tax return ext. Date 10-15-2011						04/15/2011	\$0.00	
	766	Credit to your account						04/15/2011	(\$400.00)	
	971	Installment agreement established						09/02/2011	\$0.00	
	150	Tax return filed						11/21/2011	\$3,295.00	
	196	Interest charged for late payment						11/21/2011	\$47.57	
	276	Penalty for late payment of tax						11/21/2011	\$86.84	
	971	Notice issued CP 0014						11/21/2011	\$0.00	
	670	Payment						01/30/2012	(\$895.00)	
	672	Removed payment CIVIL PENALTY 201201						01/30/2012	\$105.00	
	673	Payment						01/30/2012	(\$105.00)	
	670	Payment						03/26/2012	(\$1,000.00)	
	670	Payment						06/28/2012	(\$800.00)	
	670	Payment						08/27/2012	(\$764.00)	
	826	Credit transferred out to 1040 201112						08/27/2012	\$365.67	
	196	Interest charged for late payment						09/17/2012	\$38.18	
	276	Penalty for late payment of tax						09/17/2012	\$25.74	

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	971	No longer in installment agreement status						09/17/2012	\$0.00
	971	Notice issued CP 0049						09/17/2012	\$0.00
2011	01	Single	(\$27,593.00)	\$0.00	\$4,762.00	\$35,803.00	\$0.00	\$4,762.00	05/29/2012
Transactions									
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>
	460	Extension of time to file tax return ext. Date 10-15-2012						04/15/2012	\$0.00
	806	W-2 or 1099 withholding						04/15/2012	(\$24.00)
	150	Tax return filed						07/02/2012	\$4,762.00
	196	Interest charged for late payment						07/02/2012	\$30.39
	276	Penalty for late payment of tax						07/02/2012	\$71.07
	971	Notice issued CP 0014						07/02/2012	\$0.00
	971	Installment agreement established						07/21/2012	\$0.00
	706	Credit transferred in from 1040 201012						08/27/2012	(\$365.67)
	971	No longer in installment agreement status						10/22/2012	\$0.00
	971	Tax period blocked from automated levy program						10/29/2012	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued						04/09/2013	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed						04/12/2013	\$0.00
	971	Tax period blocked from automated levy program						08/03/2013	\$0.00
	670	Payment						08/06/2013	(\$63.00)
	971	Installment agreement established						08/12/2013	\$0.00
	971	No longer in installment agreement status						06/23/2014	\$0.00
	971	Tax period blocked from automated levy program						06/30/2014	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	971	Installment agreement established						01/07/2015	\$0.00
	670	Payment						02/17/2015	(\$230.00)
	672	Removed payment CIVIL PENALTY 201501						02/17/2015	\$120.00
	673	Payment						02/17/2015	(\$120.00)
	971	No longer in installment agreement status						10/12/2015	\$0.00
	971	Tax period blocked from automated levy program						10/19/2015	\$0.00
	971	Installment agreement established						04/26/2016	\$0.00
	670	Payment						04/27/2016	(\$180.00)
	672	Removed payment CIVIL PENALTY 201601						04/27/2016	\$120.00
	673	Payment						04/27/2016	(\$120.00)
	670	Payment						05/09/2016	(\$229.82)
	670	Payment						08/25/2016	(\$300.00)
	670	Payment						10/03/2016	(\$250.00)
	672	Removed payment CIVIL PENALTY 201601						10/03/2016	\$50.00
	673	Payment						10/03/2016	(\$50.00)
	672	Removed payment						10/17/2016	\$300.00
	673	Payment						10/17/2016	(\$300.00)
	670	Payment						10/31/2016	(\$350.00)
	670	Payment						11/23/2016	(\$350.00)
	670	Payment						12/23/2016	(\$350.00)
	670	Payment						02/10/2017	(\$420.00)
	971	No longer in installment agreement status						02/27/2017	\$0.00
	971	Tax period blocked from automated levy program						03/06/2017	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	971	First Levy Issued on Module						03/20/2017	\$0.00
	670	Payment						03/27/2017	(\$675.00)
	971	First Levy Issued on Module						05/08/2017	\$0.00
	670	Payment						05/19/2017	(\$600.00)
	582	Lien placed on assets due to balance owed						09/01/2017	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						09/05/2017	\$0.00
	360	Fees and other expenses for collection						09/25/2017	\$80.00
	196	Interest charged for late payment						10/23/2017	\$697.55
	276	Penalty for late payment of tax						10/23/2017	\$1,003.90
	971	Notice issued CP 071C						10/23/2017	\$0.00
	971	Pending installment agreement						03/07/2018	\$0.00
	960	Appointed representative						03/12/2018	\$0.00
	670	Payment Levy						03/30/2018	(\$7.65)
	972	Removed installment agreement						08/21/2018	\$0.00
	971	Passport certified seriously delinquent tax debt						09/17/2018	\$0.00
	670	Payment Levy						10/02/2018	(\$2,348.20)
	196	Interest charged for late payment						10/29/2018	\$98.43
	972	Passport certified seriously delinquent tax debt reversal						11/05/2018	\$0.00
	960	Appointed representative						01/06/2020	\$0.00
2012	01	Single	(\$16,932.00)	\$0.00	\$4,713.00	\$35,435.00	\$0.00	\$4,713.00	06/24/2013
Transactions									
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	460	Extension of time to file tax return ext. Date 10-15-2013						04/13/2013	\$0.00
	150	Tax return filed						07/29/2013	\$4,713.00
	170	Penalty for not pre-paying tax 04-11-2024						07/29/2013	\$85.00
	196	Interest charged for late payment						07/29/2013	\$40.85
	276	Penalty for late payment of tax						07/29/2013	\$94.26
	971	Notice issued CP 0014						07/29/2013	\$0.00
	971	Installment agreement established						08/12/2013	\$0.00
	670	Payment						12/07/2013	(\$3,895.00)
	672	Removed payment CIVIL PENALTY 201401						12/07/2013	\$105.00
	673	Payment						12/07/2013	(\$105.00)
	971	No longer in installment agreement status						06/23/2014	\$0.00
	971	Tax period blocked from automated levy program						06/30/2014	\$0.00
	971	Installment agreement established						01/07/2015	\$0.00
	971	No longer in installment agreement status						10/12/2015	\$0.00
	971	Tax period blocked from automated levy program						10/19/2015	\$0.00
	971	Installment agreement established						04/26/2016	\$0.00
	971	No longer in installment agreement status						02/27/2017	\$0.00
	971	Tax period blocked from automated levy program						03/06/2017	\$0.00
	971	First Levy Issued on Module						05/08/2017	\$0.00
	582	Lien placed on assets due to balance owed						09/01/2017	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						09/05/2017	\$0.00
	971	Account match for federal levy payment program						09/18/2017	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued						09/18/2017	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	971	Collection due process Notice of Intent to Levy -- return receipt signed						09/18/2017	\$0.00
	971	Notice issued CP 0090						09/18/2017	\$0.00
	196	Interest charged for late payment						10/23/2017	\$207.31
	276	Penalty for late payment of tax						10/23/2017	\$227.08
	971	Notice issued CP 071C						10/23/2017	\$0.00
	971	Pending installment agreement						03/07/2018	\$0.00
	960	Appointed representative						03/12/2018	\$0.00
	972	Removed installment agreement						08/21/2018	\$0.00
	971	First Levy Issued on Module						08/28/2018	\$0.00
	971	Passport certified seriously delinquent tax debt						09/17/2018	\$0.00
	670	Payment Levy						10/02/2018	(\$1,536.84)
	196	Interest charged for late payment						10/29/2018	\$64.34
	972	Passport certified seriously delinquent tax debt reversal						11/05/2018	\$0.00
	960	Appointed representative						01/06/2020	\$0.00
2013	01	Single	\$31,323.00	\$21,295.00	\$5,872.00	\$55,922.00	\$0.00	\$8,556.00	07/14/2014
Transactions									
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>
	430	Estimated tax payment						07/29/2013	(\$1,179.00)
	670	Payment						02/21/2014	(\$4,500.00)
	460	Extension of time to file tax return ext. Date 10-15-2014						04/14/2014	\$0.00
	150	Tax return filed						08/18/2014	\$5,872.00
	170	Penalty for not pre-paying tax 04-02-2025						08/18/2014	\$94.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	196	Interest charged for late payment						08/18/2014	\$1.99
	276	Penalty for late payment of tax						08/18/2014	\$4.82
	971	Notice issued CP 0023						08/18/2014	\$0.00
	971	Tax period blocked from automated levy program						11/24/2014	\$0.00
	971	Installment agreement established						01/07/2015	\$0.00
	670	Payment						03/16/2015	(\$350.00)
	196	Interest charged for late payment						04/06/2015	\$5.12
	276	Penalty for late payment of tax						04/06/2015	\$8.21
	570	Additional account action pending						04/06/2015	\$0.00
	922	Review of unreported income						01/25/2016	\$0.00
	240	Miscellaneous penalty IRC 6662(c), (d), (e), (f), (g), or (h) Accuracy-Related Penalty 09-30-2026						02/15/2016	\$1,086.00
	290	Additional tax assessed 09-30-2026						02/15/2016	\$5,429.00
	971	Notice issued CP 0021						02/15/2016	\$0.00
	971	No longer in installment agreement status						03/21/2016	\$0.00
	971	Tax period blocked from automated levy program						03/28/2016	\$0.00
	971	Installment agreement established						04/26/2016	\$0.00
	971	No longer in installment agreement status						02/27/2017	\$0.00
	971	Tax period blocked from automated levy program						03/06/2017	\$0.00
	971	First Levy Issued on Module						05/08/2017	\$0.00
	582	Lien placed on assets due to balance owed						09/01/2017	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						09/05/2017	\$0.00
	971	Account match for federal levy payment program						09/18/2017	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued						09/18/2017	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	971	Collection due process Notice of Intent to Levy -- return receipt signed						09/18/2017	\$0.00
	971	Notice issued CP 0090						09/18/2017	\$0.00
	196	Interest charged for late payment						10/23/2017	\$817.78
	276	Penalty for late payment of tax						10/23/2017	\$630.50
	971	Notice issued CP 071C						10/23/2017	\$0.00
	971	Pending installment agreement						03/07/2018	\$0.00
	960	Appointed representative						03/12/2018	\$0.00
	972	Removed installment agreement						08/21/2018	\$0.00
	971	First Levy Issued on Module						08/28/2018	\$0.00
	971	Passport certified seriously delinquent tax debt						09/17/2018	\$0.00
	670	Payment Levy						10/02/2018	(\$3,028.18)
	670	Payment Levy						10/04/2018	(\$1,287.12)
	670	Payment Levy						10/10/2018	(\$420.15)
	196	Interest charged for late payment						11/26/2018	\$373.60
	276	Penalty for late payment of tax						11/26/2018	\$607.08
	971	Notice issued CP 071D						11/26/2018	\$0.00
	530	Balance due account currently not collectible - not due to hardship						11/28/2018	\$0.00
	972	Removed installment agreement						11/28/2018	\$0.00
	670	Payment						09/30/2019	(\$45.97)
	537	Account currently considered collectable						10/14/2019	\$0.00
	971	Account match for federal levy payment program						10/21/2019	\$0.00
	960	Appointed representative						01/06/2020	\$0.00
	470	Claim pending						08/27/2020	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	472	Resolved claim						02/24/2021	\$0.00
	290	Additional tax assessed 00-00-0000						03/22/2021	\$0.00
	706	Credit transferred in from 1040 202012						08/02/2021	(\$1.49)
2014	02	Head of Household	\$31,671.00	\$3,982.00	\$7,439.00	\$48,623.00	\$0.00	\$7,439.00	10/14/2015
Transactions									
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>
	460	Extension of time to file tax return ext. Date 10-15-2015						04/14/2015	\$0.00
	766	Credit to your account						04/15/2015	(\$602.00)
	150	Tax return filed						11/23/2015	\$7,439.00
	170	Penalty for not pre-paying tax 06-08-2026						11/23/2015	\$117.00
	196	Interest charged for late payment						11/23/2015	\$125.89
	276	Penalty for late payment of tax						11/23/2015	\$273.48
	971	Notice issued CP 0014						11/23/2015	\$0.00
	971	Tax period blocked from automated levy program						02/22/2016	\$0.00
	971	Installment agreement established						04/26/2016	\$0.00
	971	No longer in installment agreement status						02/27/2017	\$0.00
	971	Tax period blocked from automated levy program						03/06/2017	\$0.00
	971	First Levy Issued on Module						05/08/2017	\$0.00
	582	Lien placed on assets due to balance owed						09/01/2017	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						09/05/2017	\$0.00
	971	Account match for federal levy payment program						09/18/2017	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)	
	971	Collection due process Notice of Intent to Levy -- issued						09/18/2017	\$0.00	
	971	Collection due process Notice of Intent to Levy -- return receipt signed						09/18/2017	\$0.00	
	971	Notice issued CP 0090						09/18/2017	\$0.00	
	196	Interest charged for late payment						10/23/2017	\$557.44	
	276	Penalty for late payment of tax						10/23/2017	\$1,025.54	
	971	Notice issued CP 071C						10/23/2017	\$0.00	
	971	Pending installment agreement						03/07/2018	\$0.00	
	960	Appointed representative						03/12/2018	\$0.00	
	972	Removed installment agreement						08/21/2018	\$0.00	
	971	First Levy Issued on Module						08/28/2018	\$0.00	
	971	Passport certified seriously delinquent tax debt						09/17/2018	\$0.00	
	196	Interest charged for late payment						11/26/2018	\$460.98	
	276	Penalty for late payment of tax						11/26/2018	\$410.22	
	971	Notice issued CP 071D						11/26/2018	\$0.00	
	530	Balance due account currently not collectible - not due to hardship						11/28/2018	\$0.00	
	972	Removed installment agreement						11/28/2018	\$0.00	
	537	Account currently considered collectable						10/14/2019	\$0.00	
	960	Appointed representative						01/06/2020	\$0.00	
2015	02	Head of Household	\$350,430.00	\$337,500.00	\$14,349.00	\$118,499.00	\$0.00	\$22,152.00	10/04/2016	
		Transactions								
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>	

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	460	Extension of time to file tax return ext. Date 10-15-2016						04/15/2016	\$0.00
	150	Tax return filed						11/07/2016	\$14,349.00
	176	Penalty for not pre-paying tax 05-23-2027						11/07/2016	\$136.81
	196	Interest charged for late payment						11/07/2016	\$326.69
	276	Penalty for late payment of tax						11/07/2016	\$502.21
	971	Notice issued CP 0014						11/07/2016	\$0.00
	971	Installment agreement established						11/19/2016	\$0.00
	971	No longer in installment agreement status						12/12/2016	\$0.00
	420	Examination of tax return						02/10/2017	\$0.00
	971	Tax period blocked from automated levy program						04/03/2017	\$0.00
	971	First Levy Issued on Module						06/05/2017	\$0.00
	582	Lien placed on assets due to balance owed						09/01/2017	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						09/05/2017	\$0.00
	971	Account match for federal levy payment program						09/18/2017	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued						09/18/2017	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed						09/18/2017	\$0.00
	971	Notice issued CP 0090						09/18/2017	\$0.00
	196	Interest charged for late payment						10/23/2017	\$598.53
	276	Penalty for late payment of tax						10/23/2017	\$1,434.90
	971	Notice issued CP 071C						10/23/2017	\$0.00
	560	IRS can assess tax until 03-02-2020						11/07/2017	\$0.00
	971	Pending installment agreement						03/07/2018	\$0.00
	960	Appointed representative						03/12/2018	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	290	Additional tax assessed 00-00-0000						04/09/2018	\$0.00
	240	Miscellaneous penalty 08-21-2028						04/16/2018	\$20,851.40
	300	Additional tax assessed by examination 08-21-2028						04/16/2018	\$104,257.00
	421	Closed examination of tax return						04/16/2018	\$0.00
	971	Notice issued CP 0021						04/16/2018	\$0.00
	582	Lien placed on assets due to balance owed						05/04/2018	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						05/10/2018	\$0.00
	360	Fees and other expenses for collection						05/28/2018	\$80.00
	972	Removed installment agreement						08/21/2018	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued						08/28/2018	\$0.00
	971	Passport certified seriously delinquent tax debt						09/17/2018	\$0.00
	196	Interest charged for late payment						11/26/2018	\$15,143.38
	276	Penalty for late payment of tax						11/26/2018	\$8,948.12
	971	Notice issued CP 071D						11/26/2018	\$0.00
	530	Balance due account currently not collectible - not due to hardship						11/28/2018	\$0.00
	972	Removed installment agreement						11/28/2018	\$0.00
	971	First Levy Issued on Module						02/11/2019	\$0.00
	537	Account currently considered collectable						10/14/2019	\$0.00
	960	Appointed representative						01/06/2020	\$0.00
	420	Examination of tax return						01/29/2021	\$0.00
	470	Claim pending						02/03/2021	\$0.00
2016	01	Single	\$35,694.00	\$0.00	\$7,543.00	\$49,300.00	\$0.00	\$7,543.00	03/04/2018

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
Transactions									
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>
	460	Extension of time to file tax return ext. Date 10-15-2017						04/15/2017	\$0.00
	971	Pending installment agreement						03/07/2018	\$0.00
	960	Appointed representative						03/12/2018	\$0.00
	150	Tax return filed						03/26/2018	\$7,543.00
	166	Penalty for filing tax return after the due date 08-21-2028						03/26/2018	\$1,697.17
	170	Penalty for not pre-paying tax 08-21-2028						03/26/2018	\$180.00
	196	Interest charged for late payment						03/26/2018	\$321.02
	276	Penalty for late payment of tax						03/26/2018	\$452.58
	971	Notice issued CP 0014						03/26/2018	\$0.00
	582	Lien placed on assets due to balance owed						04/27/2018	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing						05/01/2018	\$0.00
	360	Fees and other expenses for collection						05/21/2018	\$80.00
	972	Removed installment agreement						08/21/2018	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued						08/28/2018	\$0.00
	971	Passport certified seriously delinquent tax debt						09/17/2018	\$0.00
	971	Account match for federal levy payment program						11/05/2018	\$0.00
	971	First Levy Issued on Module						11/12/2018	\$0.00
	530	Balance due account currently not collectible - not due to hardship						11/28/2018	\$0.00
	972	Removed installment agreement						11/28/2018	\$0.00
	537	Account currently considered collectable						10/14/2019	\$0.00
	960	Appointed representative						01/06/2020	\$0.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)	
2017	01	Married Filing Separate	\$9,784.00	\$0.00	\$532.00	\$3,476.00	\$0.00	\$532.00	02/03/2019	
Transactions										
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>	
	960	Appointed representative						03/12/2018	\$0.00	
	460	Extension of time to file tax return ext. Date 10-15-2018						04/15/2018	\$0.00	
	610	Payment with return						02/03/2019	(\$532.00)	
	150	Tax return filed						02/25/2019	\$532.00	
	166	Penalty for filing tax return after the due date 02-25-2029						02/25/2019	\$210.00	
	196	Interest charged for late payment						02/25/2019	\$26.65	
	276	Penalty for late payment of tax						02/25/2019	\$26.60	
	971	Notice issued CP 0014						02/25/2019	\$0.00	
	670	Payment						03/08/2019	(\$263.25)	
	960	Appointed representative						01/06/2020	\$0.00	
Transactions										
2018	01	Married Filing Separate	\$34,281.00	\$22,281.00	\$2,600.00	\$11,808.00	\$0.00	\$1,807.00	06/05/2019	
Transactions										
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>	
	150	Tax return filed						07/15/2019	\$2,600.00	
	166	Penalty for filing tax return after the due date 07-15-2029						07/15/2019	\$234.00	
	170	Penalty for not pre-paying tax 07-15-2029						07/15/2019	\$19.00	
	196	Interest charged for late payment						07/15/2019	\$41.52	

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)
	276	Penalty for late payment of tax						07/15/2019	\$39.00
	971	Notice issued CP 0014						07/15/2019	\$0.00
	670	Payment						08/26/2019	(\$933.52)
	670	Payment						09/09/2019	(\$2,000.00)
	960	Appointed representative						01/06/2020	\$0.00
	160	Penalty for filing tax return after the due date 10-26-2030						10/26/2020	\$308.00
	196	Interest charged for late payment						10/26/2020	\$265.06
	276	Penalty for late payment of tax						10/26/2020	\$26.00
	290	Additional tax assessed 10-26-2030						10/26/2020	\$3,080.00
	971	Notice issued CP 0022						10/26/2020	\$0.00
	922	Review of unreported income						10/27/2020	\$0.00
	971	Tax period blocked from automated levy program						02/15/2021	\$0.00
	670	Payment						03/22/2021	(\$800.40)
2019	01	Married Filing Separate	\$27,398.00	\$15,198.00	\$3,263.00	\$10,695.00	\$0.00	\$1,636.00	10/08/2020
Transactions									
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>
	660	Estimated tax payment						05/06/2019	(\$1,000.00)
	960	Appointed representative						01/06/2020	\$0.00
	460	Extension of time to file tax return ext. Date 10-15-2020						07/14/2020	\$0.00
	670	Payment						07/15/2020	(\$1,500.00)
	150	Tax return filed						12/21/2020	\$3,263.00

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)	
	170	Penalty for not pre-paying tax 12-21-2030							12/21/2020	\$88.00
	196	Interest charged for late payment							12/21/2020	\$10.01
	276	Penalty for late payment of tax							12/21/2020	\$22.89
	971	Notice issued CP 0023							12/21/2020	\$0.00
	670	Payment							02/18/2021	(\$883.90)
2020	01	Married Filing Separate	\$14,995.00	\$2,595.00	\$861.00	\$3,934.00	\$0.00	\$602.00	04/24/2021	
		Transactions								
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>	
	846	Refund issued						05/01/2020	\$1,200.00	
	290	Additional tax assessed 00-00-0000						05/11/2020	\$0.00	
	766	Tax relief credit						05/11/2020	(\$1,200.00)	
	971	Notice issued NOTICE1444						05/11/2020	\$0.00	
	960	Appointed representative						06/08/2020	\$0.00	
	846	Refund issued						01/06/2021	\$600.00	
	290	Additional tax assessed 00-00-0000						01/18/2021	\$0.00	
	766	Tax relief credit						01/18/2021	(\$600.00)	
	150	Tax return filed						07/05/2021	\$861.00	
	196	Interest charged for late payment						07/05/2021	\$3.48	
	971	Notice issued CP 0014						07/05/2021	\$0.00	
	670	Payment						08/02/2021	(\$865.97)	
	826	Credit transferred out to 1040 201312						08/02/2021	\$1.49	

Period	Exemptions	Filing Status	Adjusted Gross Income	Taxable Income	Tax per Return	Taxpayer's Self-Empl. Taxable Income	Spouse's Self-Empl. Taxable Income	Total Self-Empl. Tax	Return Due Date or Return Received Date (whichever is later)	
	971	Notice issued CP 0049							08/23/2021	\$0.00
2021	01	Married Filing Separate	\$3,324.00	\$0.00	\$489.00	\$3,195.00	\$0.00	\$489.00	04/15/2022	
		Transactions								
	<i>Code</i>	<i>Explanation of Transaction</i>						<i>Date</i>	<i>Amount</i>	
	846	Refund issued						03/26/2021	\$1,400.00	
	290	Additional tax assessed 00-00-0000						04/05/2021	\$0.00	
	766	Tax relief credit						04/05/2021	(\$1,400.00)	
	971	Notice issued NOTICE1444						04/10/2021	\$0.00	
	290	Additional tax assessed 00-00-0000						05/24/2021	\$0.00	
	960	Appointed representative						06/11/2021	\$0.00	
	150	Tax return filed						06/06/2022	\$489.00	
	196	Interest charged for late payment						06/06/2022	\$2.79	
	610	Payment with return						06/06/2022	(\$489.00)	
	971	Notice issued CP 0014						06/06/2022	\$0.00	
	606	Write-off of balance due						07/04/2022	(\$2.79)	

Payments, Adjustments and Other Credits Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**
 Taxpayer SSN: **XXX-XX-1234**

Date	Transaction Code	Explanation of Transaction	Applied To	Amount
07/04/2022	606	Write-off of balance due	2021	(\$2.79)
06/06/2022	610	Payment with return	2021	(\$489.00)
08/02/2021	670	Payment	2020	(\$865.97)
08/02/2021	706	Credit transferred in from 1040 202012	2013	(\$1.49)
04/05/2021	766	Tax relief credit	2021	(\$1,400.00)
03/22/2021	670	Payment	2018	(\$800.40)
02/18/2021	670	Payment	2019	(\$883.90)
01/18/2021	766	Tax relief credit	2020	(\$600.00)
07/15/2020	670	Payment	2019	(\$1,500.00)
05/11/2020	766	Tax relief credit	2020	(\$1,200.00)
09/30/2019	670	Payment	2013	(\$45.97)
09/09/2019	670	Payment	2018	(\$2,000.00)
08/26/2019	670	Payment	2018	(\$933.52)
05/06/2019	660	Estimated tax payment	2019	(\$1,000.00)
03/08/2019	670	Payment	2017	(\$263.25)
02/03/2019	610	Payment with return	2017	(\$532.00)
10/10/2018	670	Payment Levy	2013	(\$420.15)
10/04/2018	670	Payment Levy	2013	(\$1,287.12)
10/02/2018	670	Payment Levy	2013	(\$3,028.18)
10/02/2018	670	Payment Levy	2011	(\$2,348.20)

Date	Transaction Code	Explanation of Transaction	Applied To	Amount
10/02/2018	670	Payment Levy	2012	(\$1,536.84)
03/30/2018	670	Payment Levy	2011	(\$7.65)
05/19/2017	670	Payment	2011	(\$600.00)
03/27/2017	670	Payment	2011	(\$675.00)
02/10/2017	670	Payment	2011	(\$420.00)
12/23/2016	670	Payment	2011	(\$350.00)
11/23/2016	670	Payment	2011	(\$350.00)
10/31/2016	670	Payment	2011	(\$350.00)
10/17/2016	673	Payment	2011	(\$300.00)
10/17/2016	672	Removed payment	2011	\$300.00
10/03/2016	670	Payment	2011	(\$250.00)
10/03/2016	673	Payment	2011	(\$50.00)
10/03/2016	672	Removed payment CIVIL PENALTY 201601	2011	\$50.00
08/25/2016	670	Payment	2011	(\$300.00)
05/09/2016	670	Payment	2011	(\$229.82)
04/27/2016	670	Payment	2011	(\$180.00)
04/27/2016	673	Payment	2011	(\$120.00)
04/27/2016	672	Removed payment CIVIL PENALTY 201601	2011	\$120.00
04/15/2015	766	Credit to your account	2014	(\$602.00)
03/16/2015	670	Payment	2013	(\$350.00)
02/17/2015	670	Payment	2011	(\$230.00)
02/17/2015	673	Payment	2011	(\$120.00)
02/17/2015	672	Removed payment CIVIL PENALTY 201501	2011	\$120.00

Date	Transaction Code	Expanation of Transaction	Applied To	Amount
02/21/2014	670	Payment	2013	(\$4,500.00)
12/07/2013	670	Payment	2012	(\$3,895.00)
12/07/2013	673	Payment	2012	(\$105.00)
12/07/2013	672	Removed payment CIVIL PENALTY 201401	2012	\$105.00
08/06/2013	670	Payment	2011	(\$63.00)
07/29/2013	430	Estimated tax payment	2013	(\$1,179.00)
08/27/2012	670	Payment	2010	(\$764.00)
08/27/2012	706	Credit transferred in from 1040 201012	2011	(\$365.67)
06/28/2012	670	Payment	2010	(\$800.00)
04/15/2012	806	W-2 or 1099 withholding	2011	(\$24.00)
03/26/2012	670	Payment	2010	(\$1,000.00)
01/30/2012	670	Payment	2010	(\$895.00)
01/30/2012	673	Payment	2010	(\$105.00)
01/30/2012	672	Removed payment CIVIL PENALTY 201201	2010	\$105.00
04/15/2011	766	Credit to your account	2010	(\$400.00)
Total				(\$39,918.92)

Wage & Income Summary Report

Report generated: 02 Aug, 2022 12:59 PM

Taxpayer Name: **JOHN DOE**

Taxpayer SSN: **XXX-XX-1234**

Income Type / Items Paid	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
Wages	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Federal Tax Withheld	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Allocated Tips	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Mortgage Interest Paid	\$40,605	\$8,754	\$22,237	\$31,556	\$30,229	\$29,028	\$26,083	\$30,000	\$26,513	\$28,993	\$273,998
Points Paid	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prior Year Refund	\$11	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$11
Interest	\$0	\$66	\$46	\$2	\$0	\$0	\$200	\$0	\$22	\$20	\$356
Savings Bonds	\$0	\$0	\$0	\$0	\$0	\$258	\$269	\$201	\$0	\$0	\$728
Dividends	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
IRA Contributions	\$0	\$50	\$5,490	\$1,800	\$5,500	\$5,400	\$5,400	\$5,970	\$1,140	\$0	\$30,750
Non-employee Compensation	\$76,440	\$77,510	\$76,440	\$76,440	\$73,265	\$0	\$0	\$0	\$0	\$0	\$380,095
Student Loan Interest	\$306	\$269	\$214	\$190	\$161	\$133	\$22	\$0	\$0	\$0	\$1,295
Capital Gains	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Real Estate Sales	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Gross Distributions	\$0	\$0	\$3,473	\$0	\$0	\$10,000	\$13,900	\$0	\$4,700	\$0	\$32,073
Taxable Amount	\$0	\$0	\$3,473	\$0	\$0	\$10,000	\$13,900	\$0	\$4,700	\$0	\$32,073
Fair Market Value	\$3,054	\$3,662	\$5,247	\$6,905	\$12,356	\$9,260	\$720	\$6,837	\$3,284	\$3,491	\$54,816
April Payments	\$0	\$0	\$58	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$58
March Payments	\$0	\$0	\$209	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$209
February Payments	\$0	\$0	\$267	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$267
Gross Amount of Payment Card/Third Party Transactions	\$0	\$0	\$534	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$534

Income Type / Items Paid	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
Amount of Debt Discharged	\$0	\$0	\$0	\$42,840	\$0	\$0	\$0	\$0	\$0	\$0	\$42,840
Unemployment Compensation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,718	\$0	\$1,718
SEP Contributions	\$3,100	\$525	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,625
Other Income	\$0	\$3,000	\$0	\$0	\$0	\$1,126	\$0	\$0	\$0	\$0	\$4,126
Nonemployee Compensation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Pensions and Annuities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Rent	\$11,255	\$13,404	\$14,105	\$15,549	\$15,505	\$15,503	\$15,473	\$14,134	\$15,373	\$29,078	\$159,379