

**IRS TAX ACCOUNT ANALYSIS**

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Sample Client  
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REPORT PRESENTED BY:  
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IRS ACCOUNT STATUS DASHBOARD

Year	Return Filed	Filing Status	Extension Date	Lien Active	Collections Active	Examination Active	Assessed Balance	Accrued Balance	Transcript Date
2019	RDNF	Uk					\$0.00	\$0.00	5/6/2019
2018	Original	MFJ	10/15/2019				\$26,382.11	\$29,547.96	5/6/2019
2016	Original	HOH				02/01/16	\$8,562.14	\$9,589.60	5/6/2019
2015	Original*	MFJ				01/24/14	\$27,296.32	\$31,390.77	5/6/2019
2014	Amended	MFJ	10/15/14				\$4,987.09	\$5,468.65	5/6/2019
2013	Original	MFJ	10/15/13	04/11/14	05/10/14		\$42,736.13	\$49,146.55	5/6/2019
2012	SFR	S	10/15/12	04/11/14	No		\$56,040.57	\$67,219.18	5/6/2019
2011	SFR	S	10/15/11	04/11/14	05/10/14	Closed	\$8,899.36	\$12,403.52	5/6/2019
2010	Original*	MFJ	10/15/10	06/01/12	05/10/14	Closed	\$0.00	\$0.00	5/6/2019
2009	Original	MFJ	10/15/09				\$0.00	\$0.00	5/6/2019
2008	Original	MFJ	10/15/08	Released		Closed	\$0.00	\$0.00	5/6/2019
2007	Original	MFJ	10/15/07				\$0.00	\$0.00	5/6/2019
2006	Original	MFJ	10/15/06				\$0.00	\$0.00	5/6/2019
2005	Original	MFJ*	10/15/05				\$0.00	\$0.00	5/6/2019
2004	Original	MFJ*	10/15/04				\$0.00	\$0.00	5/6/2019
2003	SFR	S	10/15/03	Released	No	Closed	\$0.00	\$0.00	5/6/2019
2002	Original	MFJ*	10/15/02				\$0.00	\$0.00	5/6/2019
2001	Original	MFJ*	10/15/01				\$0.00	\$0.00	5/6/2019
2000	Original	S					\$0.00	\$0.00	5/6/2019
1999	Original	S					\$0.00	\$0.00	10/26/2017
1998	Original	S					\$0.00	\$0.00	10/26/2017
1997	Original	S					\$0.00	\$0.00	10/26/2017
1996	Original	S					\$0.00	\$0.00	10/26/2017
1995	Original	S					\$0.00	\$0.00	10/26/2017
1994	Original	S					\$0.00	\$0.00	10/26/2017
1993	Original	S	10/15/93				\$0.00	\$0.00	10/26/2017
1992	Original	S					\$0.00	\$0.00	10/26/2017
1991	Original	S					\$0.00	\$0.00	10/26/2017
1990	Original	S					\$0.00	\$0.00	10/26/2017
						Total**	\$174,903.72	\$204,766.23	

\*Indicates an SFR was originally filed.

MFJ\* Indicates a Separate Assessment is present for that Tax Year.

\*\*Only positive numbers are included in the total.

SA NF = Separate Assessment exists but transcript is not present.

RDNF = IRS Returned a transcript with no information. "Requested Data Not Found"

IRS ACCOUNT BALANCE SUMMARY

Tax Year	Return Filed	Assessed Tax	Assessed Penalty	Assessed Interest	Assessed Other	Assessed Payments (including Withholding), Write-Offs & Credits	Refunds	Assessed Balance From Transcript*	Accrued Penalties	Accrued Interest	Total IRS Balance*
2019	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
2018	Original	\$6,792.00	\$93.00	\$0.00	\$0.00	(\$6,885.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2017	Original	\$7,213.00	\$5.00	\$0.00	\$0.00	(\$7,218.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2016	Original	\$3,701.00	\$27.00	\$0.00	\$0.00	(\$3,728.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2015	Original	\$6,890.00	\$175.04	\$57.01	\$0.00	(\$2,088.00)	\$0.00	\$5,034.05	\$780.32	\$682.56	\$6,496.93
2014	Original	\$6,032.00	\$133.55	\$46.53	\$0.00	(\$1,816.00)	\$0.00	\$4,396.08	\$962.11	\$763.32	\$6,121.51
2013	Original	\$2,499.00	\$0.00	\$0.00	\$0.00	(\$2,499.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2012	Original	\$1,343.00	\$0.00	\$0.00	\$0.00	(\$1,343.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2011	Original	\$1,973.00	\$0.00	\$0.00	\$0.00	(\$1,973.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2010	Original	\$4,607.00	\$866.28	\$326.43	\$0.00	(\$4,965.00)	\$0.00	\$834.71	\$0.00	\$111.01	\$945.72
2009	Original	\$1,828.00	\$0.00	\$0.00	\$0.00	(\$3,393.00)	\$1,565.00	\$0.00	\$0.00	\$0.00	\$0.00
2008	Original	\$881.00	\$0.00	\$0.00	\$0.00	(\$2,873.86)	\$1,992.86	\$0.00	\$0.00	\$0.00	\$0.00
2007	Original	\$5,424.00	\$320.78	\$87.20	\$0.00	(\$5,838.32)	\$6.34	\$0.00	\$0.00	\$0.00	\$0.00
2006	Original	\$5,562.00	\$213.18	\$28.83	\$0.00	(\$5,804.01)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2005	Original	\$4,334.00	\$174.87	\$29.55	\$0.00	(\$4,538.42)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2004	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2003	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2002	Original	\$4,225.00	\$1,060.12	\$174.48	\$0.00	(\$5,459.60)	\$0.00	\$0.00	\$0.00	\$0.01	\$0.01
2001	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
2000	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1999	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1998	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1997	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1996	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1995	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1994	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1993	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1992	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1991	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
1990	RDNF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	-	-	-	-
Total		\$63,304.00	\$3,068.82	\$750.03	\$0.00	(\$60,422.21)	\$3,564.20	\$10,264.84	\$1,742.43	\$1,556.90	\$13,564.17

\*Assessed Balance Total and Total IRS Balance come from the transcript. In rare instances the transaction totals do not equal the transcript totals. Usually it is less than \$50.

RESOLUTION AND COLLECTION DASHBOARD

Year	Accrued Balance	Return Filed	SFR Filed Date	Notice of Intent To Levy Date	Collections Active	Last Activity	Last Activity Date	Estimated IA Payments
2019	(\$3,072.00)	No	none	none				\$0.00
2018	\$0.00	Original	none	none				\$0.00
2017	\$38,385.24	Original	none	none	No	Installment agreement established	5/3/2014	\$532.52
2016	\$34,137.96	Original	none	none	No	Installment agreement established	4/21/2014	\$467.67
2015	\$22,215.05	Original	none	none	No	Installment agreement established	4/21/2014	\$308.36
2014	\$44,529.54	Original	none	none	No	Installment agreement established	4/21/2014	\$749.59
2013	\$5,923.75	Original	none	none	No	Installment agreement established	4/21/2014	\$127.30
2012	\$8,409.03	Original	none	none	No	Installment agreement established	4/21/2014	\$196.96
2011	\$9,611.23	Original	none	3/14/2011	4/13/2011	Installment agreement established	4/21/2014	\$387.96
2010	\$4,784.71	Original	none	3/14/2011	4/13/2011	Installment agreement established	4/21/2014	\$166.33
2009	\$0.00	Original	none	3/14/2011		No longer in installment agreement status	4/30/2012	\$0.00
2008	\$0.00	Original	none	3/14/2011		No longer in installment agreement status	8/13/2012	\$0.00
2007	\$0.00	Original	none	none		No longer in installment agreement status	6/21/2010	\$0.00
2006	\$0.00	Original	none	none		No longer in installment agreement status	4/13/2009	\$0.00
2005	\$0.00	Original	none	none				\$0.00
2004	\$0.00	Original	none	none				\$0.00
2003	\$0.00	Original	none	none		No longer in installment agreement status	6/21/2010	\$0.00
2002	\$0.00	Original	none	none		No longer in installment agreement status	4/13/2009	\$0.00
2001	\$0.00	Original	none	none				\$0.00
2000	\$0.00	Original	none	none				\$0.00
1999	-	-						
1998	-	-						
1997	-	-						
1996	-	-						
1995	-	-						
1994	-	-						
1993	-	-						
1992	-	-						
1991	-	-						
1990	-	-						
						Total Estimated IA Payment		\$2,936.69

PENALTY AND INTEREST DASHBOARD

Year	Return Filed	FTA PA	Penalties Failure to File	Penalties Failure to Pay	Accuracy Related	Accrued Penalty	Total Penalties*	Accrued Interest	Assessed Interest	Total Interest
2019	Original					\$0.00	\$0.00	\$0.00		\$0.00
2018	Original					\$0.00	\$0.00	\$0.00		\$0.00
2017	Original									
2016	Original	N	\$1,458.62	\$855.33		\$256.18	\$2,570.13	\$235.61		\$235.61
2015	Original*	Y	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00
2014	Amended					\$0.00	\$0.00	\$0.00		\$0.00
2013	Original					\$0.00	\$0.00	\$127.86	\$53.18	\$181.04
2012	SFR	Y	\$2,399.40	\$1,648.64		\$718.92	\$4,048.04	\$218.82	\$348.73	\$567.55
2011	SFR	N	\$0.00	\$0.00		\$0.00	\$0.00	\$5,593.96	\$132.89	\$5,726.85
2010	Original*					\$0.00	\$0.00	\$1,844.42	\$1,197.54	\$3,041.96
2009	Original					\$0.00	\$0.00	\$0.00	\$1,514.46	\$1,514.46
2008	Original					\$0.00	\$0.00	\$0.00	\$154.73	\$154.73
2007	Original	N		\$0.89		\$0.00	\$0.89	\$0.00		\$0.00
2006	Original	N	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00
2005	Original	N	\$12,839.74	\$3,622.18		1523.13	\$16,461.92	\$564.25		\$564.25
2004	Original					\$0.00	\$0.00	\$0.00	\$121.48	\$121.48
2003	SFR					\$963.40	\$963.40	\$0.00	\$331.82	\$331.82
2002	Original					\$0.00	\$0.00	\$0.00		\$0.00
2001	Original					\$0.00	\$0.00	\$0.00		\$0.00
2000	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1999	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1998	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1997	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1996	Original	n/a	\$156,197.12	\$28,689.15		\$0.00	\$184,886.27	\$0.00		\$0.00
1995	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1994	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1993	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1992	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
1991	Original	n/a	\$29,367.87	\$11,895.65		\$0.00	\$41,263.52	\$0.00		\$0.00
1990	Original	n/a				\$0.00	\$0.00	\$0.00		\$0.00
	Totals		\$202,262.75	\$46,711.84	\$963.40	\$975.10	\$250,194.17	\$8,584.92	\$3,854.83	\$12,439.75

\*Only includes Failure to File, Failure to Pay, Accuracy Related Penalties, & Accrued Penalties

FTA = First Time Abatement Opportunity. Definitions as follows:

Y = Qualifies; N = Does not qualify; ? = transcript(s) missing for 3 yr look back  
PA = Prior Penalty Abatement in tax period.

n/a = As of 11-21-17 FTA only applies to 2001 and later tax years per IRM 20.1.1.3.3.2.1.4(a).

ASED AND RSED DASHBOARD

Year	Return Filed	Original Return Filed Date	Return Due Date	Est ASE*	3 Yrs After Due Date (RSED)*	3 Yrs After Original Return Filed (RSED)*	If 3 Yr RSED Not Expired, Estimated Amount Available*	Credit/Payment Amounts Made Within Past 2 Years (RSED)*
2019	RDNF							
2018	Original	4/15/2019	10/15/2019	10/15/2022	10/15/2022	10/15/2022	\$6,885.00	\$6,885.00
2017	Original	4/15/2018	4/15/2018	4/15/2021	4/15/2021	4/15/2021	\$31,369.00	\$31,369.00
2016	Original	4/15/2017	4/15/2017	4/15/2020	4/15/2020	4/15/2020	\$11,100.00	\$11,100.00
2015	Original	4/15/2016	4/15/2016	4/15/2019	4/15/2019	4/15/2019	\$18,606.00	\$0.00
2014	Original	4/15/2015	4/15/2015	4/15/2018	4/15/2018	4/15/2018	expired	\$0.00
2013	Original	4/15/2014	4/15/2014	4/15/2017	4/15/2017	4/15/2017	expired	\$0.00
2012	Original	4/15/2013	4/15/2013	4/15/2016	4/15/2016	4/15/2016	expired	\$0.00
2011	Original	5/2/2012	10/15/2012	10/15/2015	10/15/2015	10/15/2015	expired	\$0.00
2010	Original	7/7/2011	10/15/2011	10/15/2014	10/15/2014	10/15/2014	expired	\$0.00
2009	Original	4/15/2010	4/15/2010	4/15/2013	4/15/2013	4/15/2013	expired	\$0.00
2008	Original	4/15/2009	4/15/2009	4/15/2012	4/15/2012	4/15/2012	expired	\$0.00
2007	Original	4/15/2008	4/15/2008	4/15/2011	4/15/2011	4/15/2011	expired	\$0.00
2006	Original	4/15/2007	4/15/2007	4/15/2010	4/15/2010	4/15/2010	expired	\$0.00
2005	Original	4/15/2006	4/15/2006	4/15/2009	4/15/2009	4/15/2009	expired	\$0.00
2004	Original	4/15/2005	4/15/2005	4/15/2008	4/15/2008	4/15/2008	expired	\$0.00
2003	Original	4/15/2004	4/15/2004	4/15/2007	4/15/2007	4/15/2007	expired	\$0.00
2002	Amended	4/15/2003	4/15/2003	4/15/2006	4/15/2006	4/15/2006	expired	\$0.00
2001	Original	4/15/2002	4/15/2002	4/15/2005	4/15/2005	4/15/2005	expired	\$0.00
2000	Original	4/15/2001	8/15/2001	8/15/2004	8/15/2004	8/15/2004	expired	\$0.00
1999	Original	4/15/2000	4/15/2000	4/15/2003	4/15/2003	4/15/2003	expired	\$0.00
1998	Original	4/15/1999	4/15/1999	4/15/2002	4/15/2002	4/15/2002	expired	\$0.00
1997	Original	4/15/1998	4/15/1998	4/15/2001	4/15/2001	4/15/2001	expired	\$0.00
1996	Original	4/15/1997	8/15/1997	8/15/2000	8/15/2000	8/15/2000	expired	\$0.00
1995	RDNF							
1994	RDNF							
1993	Original	4/15/1994	4/15/1994	4/15/1997	4/15/1997	4/15/1997	expired	\$0.00
1992	Original	4/15/1993	4/15/1993	4/15/1996	4/15/1996	4/15/1996	expired	\$0.00
1991	Original	4/15/1992	4/15/1992	4/15/1995	4/15/1995	4/15/1995	expired	\$0.00
1990	Original	4/15/1991	4/15/1991	4/15/1994	4/15/1994	4/15/1994	expired	\$0.00

\*ASED and RSED are estimates and do not calculate many exceptions such as fraud.

CSED CALCULATIONS AND IA PAYMENTS

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED TOTAL TOLLING DAYS	ESTIMATED CSED	LESSER OF MONTHS UNTIL CSED OR 72	IA AMOUNT
2000	150	Tax return filed	2/7/2005	\$2,415.00	\$0.00		2/8/15		\$0.00
	166	Penalty for filing tax return after the due date	2/7/2005	\$0.00	\$0.00		2/8/15		\$0.00
	196	Interest charged for late payment	2/7/2005	\$0.00	\$0.00		2/8/15		\$0.00
		2000 Total IA Payments							\$0.00
2001	150	Tax return filed	2/7/2005	\$3,120.00	\$0.00		2/8/15		\$0.00
		2001 Total IA Payments							\$0.00
2002	150	Tax return filed	2/21/2005	\$1,830.00	\$0.00	860	7/1/17		\$0.00
	300	Additional tax assessed by examination	10/23/2006	\$1,034.00	\$0.00	454	7/1/17		\$0.00
	270	Penalty for late payment of tax	10/23/2006	\$65.10	\$0.00		7/1/17		\$0.00
	160	Penalty for filing tax return after the due date	10/23/2006	\$139.50	\$0.00	454	7/1/17		\$0.00
	336	Interest charged for late payment	10/23/2006	\$288.12	\$0.00		7/1/17		\$0.00
	196	Interest charged for late payment	3/2/2009	\$234.28	\$0.00		7/1/17		\$0.00
	196	Interest charged for late payment	3/30/2009	\$94.30	\$0.00		7/1/17		\$0.00
	270	Penalty for late payment of tax	4/13/2009	\$179.74	\$0.00		7/1/17		\$0.00
		2002 Total IA Payments							\$0.00
2003	150	Tax return filed	2/7/2005	\$781.00	\$0.00	860	6/17/17		\$0.00
	300	Additional tax assessed by examination	10/23/2006	\$1,130.00	\$0.00	454	6/17/17		\$0.00
	336	Interest charged for late payment	10/23/2006	\$263.28	\$0.00		6/17/17		\$0.00
	276	Penalty for late payment of tax	2/22/2010	\$128.72	\$0.00		6/17/17		\$0.00
	276	Penalty for late payment of tax	5/10/2010	\$286.27	\$0.00		6/17/17		\$0.00
	196	Interest charged for late payment	5/10/2010	\$88.73	\$0.00		6/17/17		\$0.00
	196	Interest charged for late payment	6/21/2010	\$343.54	\$0.00		6/17/17		\$0.00
		2003 Total IA Payments							\$0.00
2004	170	Penalty for not pre-paying tax	9/12/2006	\$60.00	\$0.00	590	4/26/18		\$0.00
	150	Tax return filed	10/9/2006	\$3,098.00	\$0.00	563	4/26/18		\$0.00
	276	Penalty for late payment of tax	10/9/2006	\$52.52	\$0.00		4/26/18		\$0.00
	166	Penalty for filing tax return after the due date	10/9/2006	\$472.72	\$0.00	563	4/26/18		\$0.00
	196	Interest charged for late payment	10/9/2006	\$277.01	\$0.00		4/26/18		\$0.00

CSED CALCULATIONS AND IA PAYMENTS

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED TOTAL TOLLING DAYS	ESTIMATED CSED	LESSER OF MONTHS UNTIL CSED OR 72	IA AMOUNT
	360	Fees and other expenses for collection	5/9/2011	\$10.00	\$0.00	69	4/26/18		\$0.00
	276	Penalty for late payment of tax	7/25/2011	\$66.75	\$0.00		4/26/18		\$0.00
	276	Penalty for late payment of tax	8/1/2011	\$402.22	\$0.00		4/26/18		\$0.00
	196	Interest charged for late payment	8/1/2011	\$778.64	\$0.00		4/26/18		\$0.00
	196	Interest charged for late payment	8/13/2012	\$31.33	\$0.00		4/26/18		\$0.00
		2004 Total IA Payments							\$0.00
2005									
	150	Tax return filed	10/9/2006	\$4,608.00	\$0.00	254	6/21/17		\$0.00
	276	Penalty for late payment of tax	10/9/2006	\$93.15	\$0.00		6/21/17		\$0.00
	170	Penalty for not pre-paying tax	10/9/2006	\$126.00	\$0.00	254	6/21/17		\$0.00
	166	Penalty for filing tax return after the due date	10/9/2006	\$698.62	\$0.00	254	6/21/17		\$0.00
	196	Interest charged for late payment	10/9/2006	\$142.22	\$0.00		6/21/17		\$0.00
	276	Penalty for late payment of tax	5/14/2012	\$672.96	\$0.00		6/21/17		\$0.00
	196	Interest charged for late payment	5/14/2012	\$1,246.74	\$0.00		6/21/17		\$0.00
		2005 Total IA Payments							\$0.00
2006									
	150	Tax return filed	1/5/2009	\$6,549.00	\$0.00	145	5/31/19		\$0.00
	276	Penalty for late payment of tax	1/5/2009	\$683.44	\$0.00		5/31/19		\$0.00
	176	Penalty for not pre-paying tax	1/5/2009	\$163.27	\$0.00	145	5/31/19		\$0.00
	166	Penalty for filing tax return after the due date	1/5/2009	\$1,464.52	\$1,231.69	145	5/31/19	13	\$94.75
	196	Interest charged for late payment	1/5/2009	\$930.58	\$930.58		5/31/19	13	\$71.58
		2006 Total IA Payments							\$166.33
2007									
	150	Tax return filed	7/6/2009	\$5,196.00	\$5,196.00	145	11/29/19	19	\$273.47
	276	Penalty for late payment of tax	7/6/2009	\$389.70	\$389.70		11/29/19	19	\$20.51
	170	Penalty for not pre-paying tax	7/6/2009	\$236.00	\$236.00	145	11/29/19	19	\$12.42
	166	Penalty for filing tax return after the due date	7/6/2009	\$1,169.10	\$1,169.10	145	11/29/19	19	\$61.53
	196	Interest charged for late payment	7/6/2009	\$380.59	\$380.59		11/29/19	19	\$20.03
		2007 Total IA Payments							\$387.96
2008									
	150	Tax return filed	12/6/2010	\$5,402.00	\$4,802.00	121	4/7/21	35	\$137.20
	276	Penalty for late payment of tax	12/6/2010	\$480.20	\$480.20		4/7/21	35	\$13.72
	170	Penalty for not pre-paying tax	12/6/2010	\$154.00	\$154.00	121	4/7/21	35	\$4.40
	166	Penalty for filing tax return after the due date	12/6/2010	\$1,080.45	\$1,080.45	121	4/7/21	35	\$30.87



CSED CALCULATIONS AND IA PAYMENTS

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED TOTAL TOLLING DAYS	ESTIMATED CSED	LESSER OF MONTHS UNTIL CSED OR 72	IA AMOUNT	
2009	196	Interest charged for late payment	12/6/2010	\$376.86	\$376.86		4/7/21	35	\$10.77	
		2008 Total IA Payments							\$196.96	
	150	Tax return filed	1/3/2011	\$4,436.00	\$4,036.00	121	5/5/21	36	\$112.11	
	276	Penalty for late payment of tax	1/3/2011	\$161.44	\$161.44		5/5/21	36	\$4.48	
	170	Penalty for not pre-paying tax	1/3/2011	\$97.00	\$97.00	121	5/5/21	36	\$2.69	
	166	Penalty for filing tax return after the due date	1/3/2011	\$181.62	\$181.62	121	5/5/21	36	\$5.05	
	196	Interest charged for late payment	1/3/2011	\$106.89	\$106.89		5/5/21	36	\$2.97	
		2009 Total IA Payments							\$127.30	
2010	150	Tax return filed	7/9/2012	\$28,949.00	\$28,840.00	50	8/29/22	52	\$554.62	
	276	Penalty for late payment of tax	7/9/2012	\$2,163.00	\$2,163.00		8/29/22	52	\$41.60	
	170	Penalty for not pre-paying tax	7/9/2012	\$106.00	\$106.00	50	8/29/22	52	\$2.04	
	166	Penalty for filing tax return after the due date	7/9/2012	\$6,489.00	\$6,489.00	50	8/29/22	52	\$124.79	
	196	Interest charged for late payment	7/9/2012	\$1,370.07	\$1,370.07		8/29/22	52	\$26.35	
	360	Fees and other expenses for collection	4/21/2014	\$10.00	\$10.00		8/29/22	52	\$0.19	
		2010 Total IA Payments							\$749.59	
	2011	150	Tax return filed	12/23/2013	\$15,091.00	\$15,091.00	20	1/13/24	69	\$218.71
276		Penalty for late payment of tax	12/23/2013	\$1,584.55	\$1,584.55		1/13/24	69	\$22.96	
170		Penalty for not pre-paying tax	12/23/2013	\$299.00	\$299.00	20	1/13/24	69	\$4.33	
166		Penalty for filing tax return after the due date	12/23/2013	\$3,395.47	\$3,395.47	20	1/13/24	69	\$49.21	
	196	Interest charged for late payment	12/23/2013	\$907.31	\$907.31		1/13/24	69	\$13.15	
		2011 Total IA Payments							\$308.36	
	2012	150	Tax return filed	2/24/2014	\$28,117.00	\$28,117.00	20	3/16/24	71	\$396.01
		276	Penalty for late payment of tax	2/24/2014	\$1,546.43	\$1,546.43		3/16/24	71	\$21.78
170		Penalty for not pre-paying tax	2/24/2014	\$246.00	\$246.00	20	3/16/24	71	\$3.46	
166		Penalty for filing tax return after the due date	2/24/2014	\$2,530.53	\$2,530.53	20	3/16/24	71	\$35.64	
	196	Interest charged for late payment	2/24/2014	\$765.04	\$765.04		3/16/24	71	\$10.78	
		2012 Total IA Payments							\$467.67	
	2013	150	Tax return filed	5/19/2014	\$37,395.00	\$37,395.00		5/20/24	72	\$519.38
		276	Penalty for late payment of tax	5/19/2014	\$280.46	\$280.46		5/20/24	72	\$3.90

CSED CALCULATIONS AND IA PAYMENTS

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED TOTAL TOLLING DAYS	ESTIMATED CSED	LESSER OF MONTHS UNTIL CSED OR 72	IA AMOUNT
2014	170	Penalty for not pre-paying tax	5/19/2014	\$561.00	\$561.00		5/20/24	72	\$7.79
	196	Interest charged for late payment	5/19/2014	\$104.64	\$104.64		5/20/24	72	\$1.45
		2013 Total IA Payments							\$532.52
2015	286	Penalty for bad check	5/19/2014	\$64.00	\$0.00		5/20/24		\$0.00
	286	Penalty for bad check	5/19/2014	\$64.00	\$0.00		5/20/24		\$0.00
		2014 Total IA Payments							\$0.00
	150	Tax return filed	8/1/2016	\$6,890.00	\$4,802.00	30	9/1/26	72	\$79.62
2016	276	Penalty for late payment of tax	8/1/2016	\$96.04	\$96.04		9/1/26	72	\$1.59
	170	Penalty for not pre-paying tax 08-31-2026	8/1/2016	\$79.00	\$79.00	30	9/1/26	72	\$1.31
	196	Interest charged for late payment	8/1/2016	\$57.01	\$57.01		9/1/26	72	\$0.95
		2015 Accrued Penalty			\$780.32		9/1/26	72	\$12.94
2017		2015 Accrued Interest			\$682.56		9/1/26	72	\$11.32
		2015 Total IA Payments							\$107.73
	150	Tax return filed	5/15/2017	\$3,701.00	\$0.00		5/16/27		\$0.00
2018	170	Penalty for not pre-paying tax 05-15-2027	5/15/2017	\$27.00	\$0.00		5/16/27	0	\$0.00
		2016 Accrued Penalty			\$0.00		5/16/27	0	\$0.00
		2016 Accrued Interest			\$0.00		5/16/27	0	\$0.00
		2016 Total IA Payments							\$0.00
2019	150	Tax return filed	5/21/2018	\$7,213.00	\$0.00		5/22/28		\$0.00
	170	Penalty for not pre-paying tax 05-21-2028	5/21/2018	\$5.00	\$0.00		5/22/28	0	\$0.00
		2017 Accrued Penalty			\$0.00		5/22/28	0	\$0.00
		2017 Accrued Interest			\$0.00		5/22/28	0	\$0.00
2020		2017 Total IA Payments							\$0.00
	150	Tax return filed	5/13/2019	\$6,792.00	\$0.00		5/14/29		\$0.00
	170	Penalty for not pre-paying tax 05-13-2029	5/13/2019	\$93.00	\$0.00		5/14/29	0	\$0.00
		2018 Accrued Penalty			\$0.00		5/14/29	0	\$0.00
2021		2018 Accrued Interest			\$0.00		5/14/29	0	\$0.00
		2018 Total IA Payments							\$0.00
2022		No Assessments Present							

CSED TOLLING CALCULATIONS

YEAR	CODE	EXPLANATION OF TRANSACTION	START DATE	END DATE	END CODE	TOLLING DAYS	ADDITIONAL TOLLING DAYS	TOTAL DAYS
2000		No Tolling Events Found						
2001		No Tolling Events Found						
2002								
	520	Bankruptcy or other legal action filed	9/12/2005	6/21/2007	521	647	183	830
	971	No longer in installment agreement status	4/13/2009	4/13/2009		0	30	30
2003								
	520	Bankruptcy or other legal action filed	9/12/2005	6/21/2007	521	647	183	830
	971	No longer in installment agreement status	6/21/2010	6/21/2010		0	30	30
2004								
	520	Bankruptcy or other legal action filed	9/12/2005	6/21/2007	521	647	183	830
	971	No longer in installment agreement status	2/7/2011	2/7/2011		0	30	30
	971	Pending installment agreement	3/3/2011	4/4/2011	971	32	0	32
	971	No longer in installment agreement status	4/30/2012	4/30/2012		0	30	30
	971	Pending installment agreement	6/20/2012	6/29/2012	971	9	0	9
	971	No longer in installment agreement status	8/13/2012	8/13/2012		0	30	30
2005								
	971	Pending installment agreement	10/13/2006					?
	971	Pending installment agreement	3/29/2007	9/13/2007	971	168	0	168
	971	No longer in installment agreement status	2/7/2011	2/7/2011		0	30	30
	971	Pending installment agreement	3/3/2011	4/4/2011	971	32	0	32
	971	No longer in installment agreement status	4/30/2012	4/30/2012		0	30	30
2006								
	971	No longer in installment agreement status	2/7/2011	2/7/2011		0	30	30
	971	Pending installment agreement	3/3/2011	4/4/2011	971	32	0	32
	971	No longer in installment agreement status	4/30/2012	4/30/2012		0	30	30
	971	Pending installment agreement	6/20/2012	6/29/2012	971	9	0	9
	971	No longer in installment agreement status	8/26/2013	8/26/2013		0	30	30
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2007								
	971	No longer in installment agreement status	2/7/2011	2/7/2011		0	30	30
	971	Pending installment agreement	3/3/2011	4/4/2011	971	32	0	32
	971	No longer in installment agreement status	4/30/2012	4/30/2012		0	30	30
	971	Pending installment agreement	6/20/2012	6/29/2012	971	9	0	9
	971	No longer in installment agreement status	8/26/2013	8/26/2013		0	30	30
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2008								
	971	Pending installment agreement	3/3/2011	4/4/2011	971	32	0	32
	971	No longer in installment agreement status	4/30/2012	4/30/2012		0	30	30
	971	Pending installment agreement	6/20/2012	6/29/2012	971	9	0	9

? = This indicates a Pending IA with no closing.  
 Most times this does not toll, but if IRS denied IA it will.  
 Best way to confirm IA closing is call PPL.

CSED TOLLING CALCULATIONS

YEAR	CODE	EXPLANATION OF TRANSACTION	START DATE	END DATE	END CODE	TOLLING DAYS	ADDITIONAL TOLLING DAYS	TOTAL DAYS
2009	971	No longer in installment agreement status	8/26/2013	8/26/2013		0	30	30
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	Pending installment agreement	3/3/2011	4/4/2011	971	32	0	32
	971	No longer in installment agreement status	4/30/2012	4/30/2012		0	30	30
	971	Pending installment agreement	6/20/2012	6/29/2012	971	9	0	9
	971	No longer in installment agreement status	8/26/2013	8/26/2013		0	30	30
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	No longer in installment agreement status	8/26/2013	8/26/2013		0	30	30
2010	971	No longer in installment agreement status	8/26/2013	8/26/2013		0	30	30
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2011	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2012	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2013	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2014	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2015	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
	971	Pending installment agreement	4/1/2014	4/21/2014	971	20	0	20
2016	971	No longer in installment agreement status	11/14/2016	11/14/2016		0	30	30
	971	No longer in installment agreement status	11/14/2016	11/14/2016		0	30	30
2017	971	No Tolling Events Found						
	971	No Tolling Events Found						
2018	971	No Tolling Events Found						
	971	No Tolling Events Found						
2019	971	No Tolling Events Found						
	971	No Tolling Events Found						

? = This indicates a Pending IA with no closing.  
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BASE BANKRUPTCY DISCHARGE DATES WITHOUT TOLLING

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED CSED	ESTIMATED 3 YEAR LOOK BACK*	ESTIMATED 2 YEAR FILING RULE*	ESTIMATED 240 DAY ASSESSMENT*	ESTIMATED ELIGIBLE BANKRUPTCY DISCHARGE DATE*
2000										
	150	Tax return filed	2/7/2005	\$2,415.00	\$0.00	2/8/15	4/15/04	12/29/06	10/5/05	12/29/06
		Penalty for filing tax return after the due date	2/7/2005	\$0.00	\$0.00	2/8/15	4/15/04	12/29/06	10/5/05	12/29/06
	196	Interest charged for late payment	2/7/2005	\$0.00	\$0.00	2/8/15				
2001										
	150	Tax return filed	2/7/2005	\$3,120.00	\$0.00	2/8/15	4/15/05	12/29/06	10/5/05	12/29/06
2002										
	150	Tax return filed	2/21/2005	\$1,830.00	\$0.00	7/1/17	4/15/06	12/29/06	10/19/05	12/29/06
		Additional tax assessed by examination	10/23/2006	\$1,034.00	\$0.00	7/1/17	4/15/06	12/29/06	6/20/07	6/20/07
	270	Penalty for late payment of tax	10/23/2006	\$65.10	\$0.00	7/1/17				
		Penalty for filing tax return after the due date	10/23/2006	\$139.50	\$0.00	7/1/17	4/15/06	12/29/06	6/20/07	6/20/07
	336	Interest charged for late payment	10/23/2006	\$288.12	\$0.00	7/1/17				
	196	Interest charged for late payment	3/2/2009	\$234.28	\$0.00	7/1/17				
	196	Interest charged for late payment	3/30/2009	\$94.30	\$0.00	7/1/17				
	270	Penalty for late payment of tax	4/13/2009	\$179.74	\$0.00	7/1/17				
2003										
	150	Tax return filed	2/7/2005	\$781.00	\$0.00	6/17/17	4/15/07	12/21/06	10/5/05	4/15/07
		Additional tax assessed by examination	10/23/2006	\$1,130.00	\$0.00	6/17/17	4/15/07	12/21/06	6/20/07	6/20/07
	336	Interest charged for late payment	10/23/2006	\$263.28	\$0.00	6/17/17				
	276	Penalty for late payment of tax	2/22/2010	\$128.72	\$0.00	6/17/17				
	276	Penalty for late payment of tax	5/10/2010	\$286.27	\$0.00	6/17/17				
	196	Interest charged for late payment	5/10/2010	\$88.73	\$0.00	6/17/17				
	196	Interest charged for late payment	6/21/2010	\$343.54	\$0.00	6/17/17				
2004										
	170	Penalty for not pre-paying tax	9/12/2006	\$60.00	\$0.00	4/26/18	4/15/08	9/12/08	5/10/07	9/12/08
	150	Tax return filed	10/9/2006	\$3,098.00	\$0.00	4/26/18	4/15/08	9/12/08	6/6/07	9/12/08
	276	Penalty for late payment of tax	10/9/2006	\$52.52	\$0.00	4/26/18				
		Penalty for filing tax return after the due date	10/9/2006	\$472.72	\$0.00	4/26/18	4/15/08	9/12/08	6/6/07	9/12/08
	196	Interest charged for late payment	10/9/2006	\$277.01	\$0.00	4/26/18				
		Fees and other expenses for collection	5/9/2011	\$10.00	\$0.00	4/26/18	4/15/08	9/12/08	1/4/12	1/4/12
	276	Penalty for late payment of tax	7/25/2011	\$66.75	\$0.00	4/26/18				
	276	Penalty for late payment of tax	8/1/2011	\$402.22	\$0.00	4/26/18				
	196	Interest charged for late payment	8/1/2011	\$778.64	\$0.00	4/26/18				
	196	Interest charged for late payment	8/13/2012	\$31.33	\$0.00	4/26/18				

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BASE BANKRUPTCY DISCHARGE DATES WITHOUT TOLLING

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED CSED	ESTIMATED 3 YEAR LOOK BACK*	ESTIMATED 2 YEAR FILING RULE*	ESTIMATED 240 DAY ASSESSMENT*	ESTIMATED ELIGIBLE BANKRUPTCY DISCHARGE DATE*
2005										
	150	Tax return filed	10/9/2006	\$4,608.00	\$0.00	6/21/17	4/15/09	9/12/08	6/6/07	4/15/09
	276	Penalty for late payment of tax	10/9/2006	\$93.15	\$0.00	6/21/17				
	170	Penalty for not pre-paying tax	10/9/2006	\$126.00	\$0.00	6/21/17	4/15/09	9/12/08	6/6/07	4/15/09
	166	Penalty for filing tax return after the due date	10/9/2006	\$698.62	\$0.00	6/21/17	4/15/09	9/12/08	6/6/07	4/15/09
	196	Interest charged for late payment	10/9/2006	\$142.22	\$0.00	6/21/17				
	276	Penalty for late payment of tax	5/14/2012	\$672.96	\$0.00	6/21/17				
	196	Interest charged for late payment	5/14/2012	\$1,246.74	\$0.00	6/21/17				
2006										
	150	Tax return filed	1/5/2009	\$6,549.00	\$0.00	5/31/19	10/15/10	12/4/10	9/2/09	12/4/10
	276	Penalty for late payment of tax	1/5/2009	\$683.44	\$0.00	5/31/19				
	176	Penalty for not pre-paying tax	1/5/2009	\$163.27	\$0.00	5/31/19	10/15/10	12/4/10	9/2/09	12/4/10
	166	Penalty for filing tax return after the due date	1/5/2009	\$1,464.52	\$1,231.69	5/31/19	10/15/10	12/4/10	9/2/09	12/4/10
	196	Interest charged for late payment	1/5/2009	\$930.58	\$930.58	5/31/19				
2007										
	150	Tax return filed	7/6/2009	\$5,196.00	\$5,196.00	11/29/19	10/15/11	6/15/11	3/3/10	10/15/11
	276	Penalty for late payment of tax	7/6/2009	\$389.70	\$389.70	11/29/19				
	170	Penalty for not pre-paying tax	7/6/2009	\$236.00	\$236.00	11/29/19	10/15/11	6/15/11	3/3/10	10/15/11
	166	Penalty for filing tax return after the due date	7/6/2009	\$1,169.10	\$1,169.10	11/29/19	10/15/11	6/15/11	3/3/10	10/15/11
	196	Interest charged for late payment	7/6/2009	\$380.59	\$380.59	11/29/19				
2008										
	150	Tax return filed	12/6/2010	\$5,402.00	\$4,802.00	4/7/21	10/15/12	11/5/12	8/3/11	11/5/12
	276	Penalty for late payment of tax	12/6/2010	\$480.20	\$480.20	4/7/21				
	170	Penalty for not pre-paying tax	12/6/2010	\$154.00	\$154.00	4/7/21	10/15/12	11/5/12	8/3/11	11/5/12
	166	Penalty for filing tax return after the due date	12/6/2010	\$1,080.45	\$1,080.45	4/7/21	10/15/12	11/5/12	8/3/11	11/5/12
	196	Interest charged for late payment	12/6/2010	\$376.86	\$376.86	4/7/21				
2009										
	150	Tax return filed	1/3/2011	\$4,436.00	\$4,036.00	5/5/21	11/11/13	12/6/12	8/31/11	11/11/13
	276	Penalty for late payment of tax	1/3/2011	\$161.44	\$161.44	5/5/21				
	170	Penalty for not pre-paying tax	1/3/2011	\$97.00	\$97.00	5/5/21	11/11/13	12/6/12	8/31/11	11/11/13
	166	Penalty for filing tax return after the due date	1/3/2011	\$181.62	\$181.62	5/5/21	11/11/13	12/6/12	8/31/11	11/11/13
	196	Interest charged for late payment	1/3/2011	\$106.89	\$106.89	5/5/21				
2010										
	150	Tax return filed	7/9/2012	\$28,949.00	\$28,840.00	8/29/22	10/15/14	6/5/14	3/6/13	10/15/14
	276	Penalty for late payment of tax	7/9/2012	\$2,163.00	\$2,163.00	8/29/22				

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BASE BANKRUPTCY DISCHARGE DATES WITHOUT TOLLING

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED CSED	ESTIMATED 3 YEAR LOOK BACK*	ESTIMATED 2 YEAR FILING RULE*	ESTIMATED 240 DAY ASSESSMENT*	ESTIMATED ELIGIBLE BANKRUPTCY DISCHARGE DATE*
	170	Penalty for not pre-paying tax	7/9/2012	\$106.00	\$106.00	8/29/22	10/15/14	6/5/14	3/6/13	10/15/14
	166	Penalty for filing tax return after the due date	7/9/2012	\$6,489.00	\$6,489.00	8/29/22	10/15/14	6/5/14	3/6/13	10/15/14
	196	Interest charged for late payment	7/9/2012	\$1,370.07	\$1,370.07	8/29/22				
	360	Fees and other expenses for collection	4/21/2014	\$10.00	\$10.00	8/29/22	10/15/14	6/5/14	12/17/14	12/17/14
2011										
	150	Tax return filed	12/23/2013	\$15,091.00	\$15,091.00	1/13/24	10/15/15	11/18/15	8/20/14	11/18/15
	276	Penalty for late payment of tax	12/23/2013	\$1,584.55	\$1,584.55	1/13/24				
	170	Penalty for not pre-paying tax	12/23/2013	\$299.00	\$299.00	1/13/24	10/15/15	11/18/15	8/20/14	11/18/15
	166	Penalty for filing tax return after the due date	12/23/2013	\$3,395.47	\$3,395.47	1/13/24	10/15/15	11/18/15	8/20/14	11/18/15
	196	Interest charged for late payment	12/23/2013	\$907.31	\$907.31	1/13/24				
2012										
	150	Tax return filed	2/24/2014	\$28,117.00	\$28,117.00	3/16/24	10/15/16	12/4/15	10/22/14	10/15/16
	276	Penalty for late payment of tax	2/24/2014	\$1,546.43	\$1,546.43	3/16/24				
	170	Penalty for not pre-paying tax	2/24/2014	\$246.00	\$246.00	3/16/24	10/15/16	12/4/15	10/22/14	10/15/16
	166	Penalty for filing tax return after the due date	2/24/2014	\$2,530.53	\$2,530.53	3/16/24	10/15/16	12/4/15	10/22/14	10/15/16
	196	Interest charged for late payment	2/24/2014	\$765.04	\$765.04	3/16/24				
2013										
	150	Tax return filed	5/19/2014	\$37,395.00	\$37,395.00	5/20/24	10/15/17	4/15/16	1/14/15	10/15/17
	276	Penalty for late payment of tax	5/19/2014	\$280.46	\$280.46	5/20/24				
	170	Penalty for not pre-paying tax	5/19/2014	\$561.00	\$561.00	5/20/24	10/15/17	4/15/16	1/14/15	10/15/17
	196	Interest charged for late payment	5/19/2014	\$104.64	\$104.64	5/20/24				
2014										
	286	Penalty for bad check	5/19/2014	\$64.00	\$0.00	5/20/24	4/15/18		1/14/15	open
	286	Penalty for bad check	5/19/2014	\$64.00	\$0.00	5/20/24	4/15/18		1/14/15	open
2015										
	150	Tax return filed	8/1/2016	\$6,890.00	\$4,802.00	9/1/26	10/15/19	6/23/18	3/29/17	10/15/19
	276	Penalty for late payment of tax	8/1/2016	\$96.04	\$96.04	9/1/26				
	170	Penalty for not pre-paying tax 08-31-2026	8/1/2016	\$79.00	\$79.00	9/1/26	10/15/19	6/23/18	3/29/17	10/15/19
	196	Interest charged for late payment	8/1/2016	\$57.01	\$57.01	9/1/26				
2016										
	150	Tax return filed	5/15/2017	\$3,701.00	\$0.00	5/16/27	4/15/20	4/15/19	1/10/18	4/15/20
	170	Penalty for not pre-paying tax 05-15-2027	5/15/2017	\$27.00	\$0.00	5/16/27	4/15/20	4/15/19	1/10/18	4/15/20
2017										
	150	Tax return filed	5/21/2018	\$7,213.00	\$0.00	5/22/28	10/15/21	4/15/20	1/16/19	10/15/21

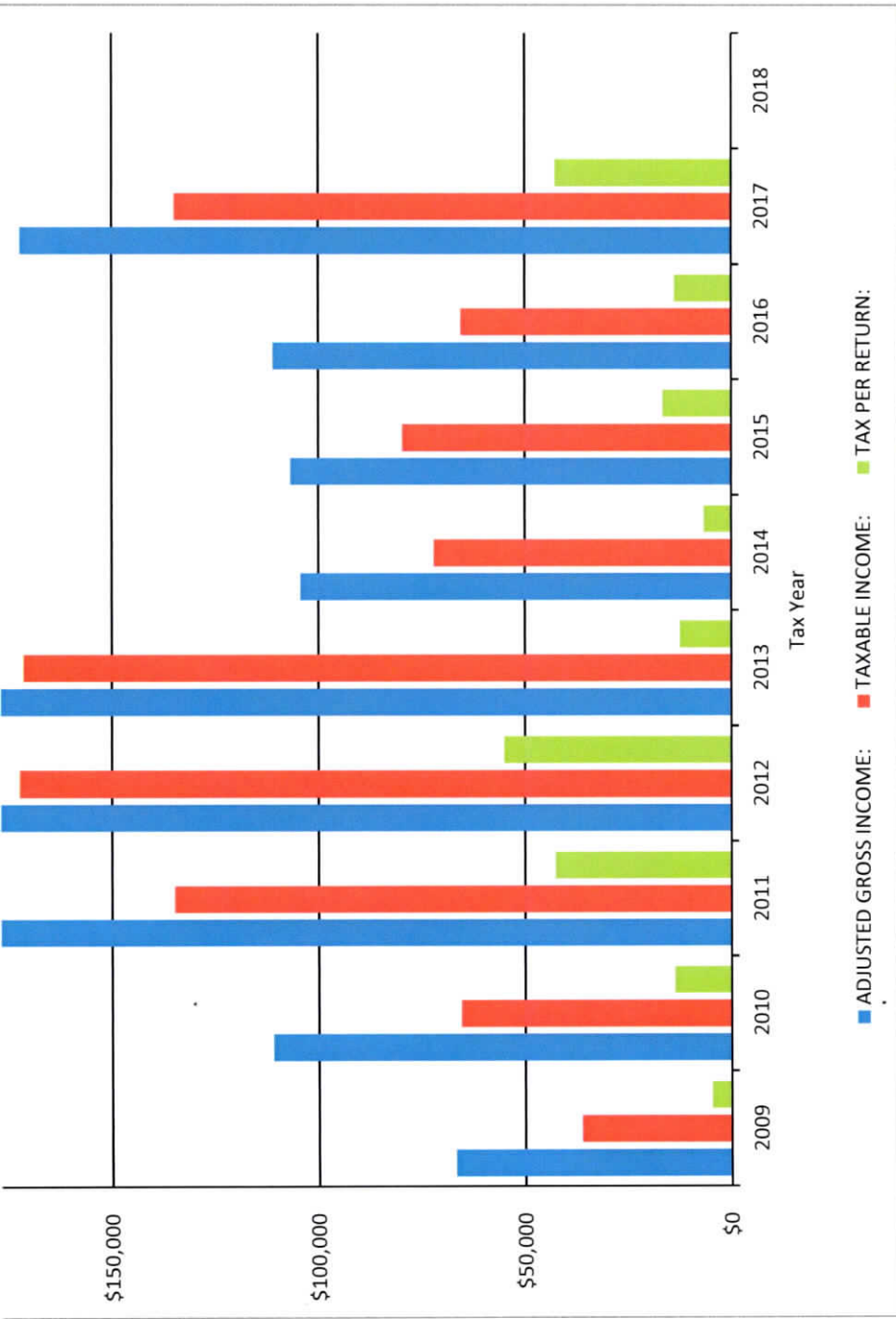
\*Tolling events are not calculated for bankruptcy dates.  
These are only estimates and should not be considered tax or legal advice.

BASE BANKRUPTCY DISCHARGE DATES WITHOUT TOLLING

YEAR	CODE	ASSESSMENT	DATE	ORIGINAL ASSESSED AMOUNT	REMAINING BALANCE	ESTIMATED CSED	ESTIMATED 3 YEAR LOOK BACK*	ESTIMATED 2 YEAR FILING RULE*	ESTIMATED 240 DAY ASSESSMENT*	ESTIMATED ELIGIBLE BANKRUPTCY DISCHARGE DATE*
	170	Penalty for not pre-paying tax 05-21-2028	5/21/2018	\$5.00	\$0.00	5/22/28	10/15/21	4/15/20	1/16/19	10/15/21
2018										
	150	Tax return filed	5/13/2019	\$6,792.00	\$0.00	5/14/29	10/15/22	4/15/21	1/8/20	10/15/22
	170	Penalty for not pre-paying tax 05-13-2029	5/13/2019	\$93.00	\$0.00	5/14/29	10/15/22	4/15/21	1/8/20	10/15/22
2019										
		No Assessments Present								

\*Tolling events are not calculated for bankruptcy dates.  
 These are only estimates and should not be considered tax or legal advice.





TAX YEAR	FILING STATUS	EXEMPTIONS:	ADJUSTED GROSS INCOME:	TAXABLE INCOME:	TAX PER RETURN:	TOTAL SELF EMPLOYMENT TAX:
2009	MFJ	5	\$66,793	\$36,186	\$4,741	\$2,476
2010	MFJ	4	\$110,946	\$65,456	\$13,749	\$8,053
2011	MFJ	2	\$180,165	\$134,921	\$42,630	\$16,142
2012	HOH	6	\$212,568	\$172,407	\$55,026	\$18,345
2013	S	5	\$210,685	\$171,457	\$12,394	\$17,250
2014	MFJ	4	\$104,292	\$71,980	\$6,605	\$4,086
2015	MFJ	4	\$106,688	\$79,588	\$16,566	\$5,612
2016	MFJ	6	\$110,946	\$65,456	\$13,749	\$8,053
2017	MFJ	5	\$172,165	\$134,921	\$42,630	\$0
2018	Uk	-	-	-	-	-

IRS NOTICES

TAX YEAR	NOTICES ISSUED	DATE
2002	Notice issued CP 0021	4/13/2009
2002	Notice issued CP 0049	4/13/2009
2003	Notice issued CP 0049	6/21/2010
2004	Collection due process Notice of Intent to Levy -- issued	3/14/2011
2004	Collection due process Notice of Intent to Levy -- return receipt signed	3/18/2011
2004	Issued notice of lien filing and right to Collection Due Process hearing	4/19/2011
2004	Notice issued CP 0060	8/1/2011
2004	Notice issued CP 0049	8/13/2012
2005	Collection due process Notice of Intent to Levy -- issued	3/14/2011
2005	Collection due process Notice of Intent to Levy -- return receipt signed	3/18/2011
2005	Issued notice of lien filing and right to Collection Due Process hearing	4/19/2011
2005	Notice issued CP 0049	5/14/2012
2005	Notice issued CP 0049	9/17/2012
2006	Notice issued CP 0059	5/5/2008
2006	Notice issued CP 0014	1/5/2009
2006	Collection due process Notice of Intent to Levy -- issued	3/14/2011
2006	Collection due process Notice of Intent to Levy -- return receipt signed	3/18/2011
2006	Issued notice of lien filing and right to Collection Due Process hearing	4/19/2011
2007	Notice issued CP 0014	7/6/2009
2007	Collection due process Notice of Intent to Levy -- issued	3/14/2011
2007	Collection due process Notice of Intent to Levy -- return receipt signed	3/18/2011
2007	Issued notice of lien filing and right to Collection Due Process hearing	4/19/2011
2008	Notice issued CP 0059	4/12/2010
2008	Notice issued CP 0014	12/6/2010
2008	Issued notice of lien filing and right to Collection Due Process hearing	4/19/2011
2009	Notice issued CP 0014	1/3/2011
2009	Issued notice of lien filing and right to Collection Due Process hearing	4/19/2011
2009	Notice issued CP 0055	10/8/2012
2010	Notice issued CP 0014	7/9/2012
2010	Notice issued CP 0055	10/8/2012
2010	Issued notice of lien filing and right to Collection Due Process hearing	4/1/2014
2011	Notice issued CP 0014	12/23/2013
2011	Issued notice of lien filing and right to Collection Due Process hearing	4/1/2014
2012	Notice issued CP 0014	2/24/2014
2013	Notice issued CP 0014	5/19/2014
2014	Notice issued CP 0014	8/17/2015
2014	Collection referred to a private debt collection agency	10/1/2018
2014	Notice issued CP 0040	10/1/2018
2015	Notice issued CP 0014	8/1/2016
2015	Collection referred to a private debt collection agency	10/1/2018
2015	Notice issued CP 0040	10/1/2018

Notice Number	IRS Notice Definitions
CP14	Balance Due
CP21	The IRS made changes to your tax return. There are 5 versions of this notice: CP21A: Due to your changes you requested you owe, CP21B: Due to your changes you requested you are owed a refund. CP21C: Due to the changes you requested your account balance is zero. CP21E: Due to changes made during an audit you owe money. CP21I: Due to changes on your tax return (IRA Related) you owe money.
CP49	Overpaid Tax Applied to Other Taxes You Owe
CP59	Request for your tax return
CP60	Notice of Credit Reversal/Corrected balance due

IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
1990		No Account Transcript Found		
1991		No Account Transcript Found		
1992		No Account Transcript Found		
1993		No Account Transcript Found		
1994		No Account Transcript Found		
1995		No Account Transcript Found		
1996		No Account Transcript Found		
1997		No Account Transcript Found		
1998		No Account Transcript Found		
1999		No Account Transcript Found		
2000				
	460	Extension of time to file ext. Date 08-15-2001	4/15/2001	\$0.00
	460	Extension of time to file ext. Date 10-15-2001	4/15/2001	\$0.00
	806	W-2 or 1099 withholding	4/15/2001	(\$10,637.00)
	846	Refund issued	11/19/2001	\$3,147.00
	150	Tax return filed	11/19/2001	\$7,490.00
	290	Additional tax assessed	11/26/2001	\$0.00
	846	Refund issued	11/26/2001	\$600.00
	766	Tax relief credit	11/26/2001	(\$600.00)
	776	Interest credited to your account	10/13/2003	(\$542.11)
	291	Prior tax abated	10/13/2003	(\$3,366.00)
	846	Refund issued	10/13/2003	\$3,908.11
2001				
	460	Extension of time to file ext. Date 08-15-2002	4/15/2002	\$0.00
	460	Extension of time to file ext. Date 10-15-2002	4/15/2002	\$0.00
	806	W-2 or 1099 withholding	4/15/2002	(\$5,893.00)
	846	Refund issued	11/11/2002	\$2,220.00
	150	Tax return filed	11/11/2002	\$3,673.00
	976	Duplicate return filed	11/25/2002	\$0.00
	776	Interest credited to your account	2/17/2003	(\$104.81)
	291	Prior tax abated	2/17/2003	(\$2,153.00)
	846	Refund issued	2/17/2003	\$2,257.81
	960	Appointed representative	12/3/2004	\$0.00
	961	Removed appointed representative	11/23/2011	\$0.00
	960	Appointed representative	1/11/2013	\$0.00
	960	Appointed representative	1/14/2013	\$0.00
2002				
	460	Extension of time to file ext. Date 08-15-2003	4/15/2003	\$0.00
	460	Extension of time to file ext. Date 10-15-2003	4/15/2003	\$0.00
	806	W-2 or 1099 withholding	4/15/2003	(\$6,937.00)
	150	Tax return filed	11/10/2003	\$6,937.00
	290	Additional tax assessed	11/17/2003	\$0.00
	846	Refund issued	11/17/2003	\$1,200.00
	766	Tax relief credit	11/17/2003	(\$1,200.00)
	420	Examination of tax return	2/19/2004	\$0.00

IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	977	Amended return filed	2/29/2004	\$0.00
	960	Appointed representative	12/3/2004	\$0.00
	640	Advance payment of tax owed Miscellaneous Payment	10/20/2005	(\$4,128.69)
	300	Additional tax assessed by examination	1/2/2006	\$2,690.00
	421	Closed examination of tax return	1/2/2006	\$0.00
	336	Interest charged for late payment	1/2/2006	\$331.82
	776	Interest credited to your account	1/2/2006	(\$1.69)
	240	Related Penalty	1/2/2006	\$963.40
	846	Refund issued	1/2/2006	\$145.16
	961	Removed appointed representative	11/23/2011	\$0.00
	960	Appointed representative	1/11/2013	\$0.00
	960	Appointed representative	1/14/2013	\$0.00
2003				
	460	Extension of time to file ext. Date 08-15-2004	4/15/2004	\$0.00
	806	W-2 or 1099 withholding	4/15/2004	(\$3,853.00)
	460	Extension of time to file ext. Date 10-15-2004	8/15/2004	\$0.00
	960	Appointed representative	12/3/2004	\$0.00
	170	Penalty for not pre-paying tax	1/3/2005	\$80.00
	610	Payment with return	1/5/2005	(\$3,609.00)
	196	Interest charged for late payment	2/7/2005	\$121.48
	150	Tax return filed	2/7/2005	\$7,382.00
	670	Payment	2/23/2005	(\$121.48)
	961	Removed appointed representative	11/23/2011	\$0.00
	960	Appointed representative	1/11/2013	\$0.00
	960	Appointed representative	1/14/2013	\$0.00
2004				
	460	Extension of time to file ext. Date 08-15-2005	4/15/2005	\$0.00
	836	Refund you chose to apply to next year's taxes	4/15/2005	\$796.00
	806	W-2 or 1099 withholding	4/15/2005	(\$4,890.00)
	460	Extension of time to file ext. Date 10-15-2005	8/15/2005	\$0.00
	150	Tax return filed	11/21/2005	\$4,094.00
2005				
	716	Credit you chose to transfer from prior tax period	4/15/2005	(\$796.00)
	460	Extension of time to file ext. Date 10-15-2006	4/15/2006	\$0.00
	806	W-2 or 1099 withholding	4/15/2006	(\$6,184.00)
	846	Refund issued	1/8/2007	\$3,162.00
	150	Tax return filed	1/8/2007	\$3,818.00
	971	Request for replacement refund	6/16/2007	\$0.00
	971	Request for replacement refund	7/23/2007	\$0.00
2006				
	766	Credit to your account	4/15/2007	(\$51.23)
	460	Extension of time to file ext. Date 10-15-2007	4/15/2007	\$0.00
	776	Interest credited to your account	4/15/2007	(\$8.77)
	806	W-2 or 1099 withholding	4/15/2007	(\$5,442.00)
	846	Refund issued	11/5/2007	\$761.00
	150	Tax return filed	11/5/2007	\$4,741.00
2007				
	460	Extension of time to file ext. Date 10-15-2008	4/15/2008	\$0.00
	670	Payment	4/15/2008	(\$5,411.00)
	806	W-2 or 1099 withholding	4/15/2008	(\$5,366.00)
	610	Payment with return	10/19/2008	(\$3,142.00)
	196	Interest charged for late payment	11/3/2008	\$92.35
	971	Notice issued CP 0014	11/3/2008	\$0.00
	276	Penalty for late payment of tax	11/3/2008	\$104.02
	150	Tax return filed	11/3/2008	\$13,749.00
	290	Additional tax assessed	11/10/2008	\$0.00
	766	Credit to your account	11/10/2008	(\$600.00)
	971	Notice issued CP 0021	11/10/2008	\$0.00
	767	Reduced or removed credit to your account	11/10/2008	\$600.00

IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	197	Reduced or removed interest charged for late payment	11/10/2008	(\$9.53)
	277	Reduced or removed penalty for late payment of tax	11/10/2008	(\$14.86)
	766	Tax relief credit	11/10/2008	(\$1,200.00)
	290	Additional tax assessed	1/5/2009	\$0.00
	971	Notice issued CP 0021	1/5/2009	\$0.00
	767	Reduced or removed tax relief credit	1/5/2009	\$1,198.02
	640	Advance payment of tax owed Miscellaneous Payment	8/14/2009	(\$100.00)
	670	Payment	11/20/2009	(\$500.00)
	971	Installment agreement established	11/21/2009	\$0.00
	290	Additional tax assessed	11/30/2009	\$1,142.00
	196	Interest charged for late payment	11/30/2009	\$71.91
	971	Notice issued CP 0022	11/30/2009	\$0.00
	922	Review of unreported income	12/1/2009	\$0.00
	826	Credit transferred out to 1040 200812	12/21/2009	\$500.00
	670	Payment	12/21/2009	(\$1,113.91)
	971	No longer in installment agreement status	1/11/2010	\$0.00
	971	Notice issued CP 0049	1/11/2010	\$0.00
	960	Appointed representative	1/11/2013	\$0.00
	960	Appointed representative	1/14/2013	\$0.00
2008				
	430	Estimated tax payment	6/15/2008	(\$2,880.00)
	430	Estimated tax payment	9/18/2008	(\$1,440.00)
	430	Estimated tax payment	1/20/2009	(\$4,070.00)
	460	Extension of time to file ext. Date 10-15-2009	4/12/2009	\$0.00
	766	Tax relief credit	4/15/2009	(\$278.00)
	806	W-2 or 1099 withholding	4/15/2009	(\$4,329.00)
	610	Payment with return	4/21/2009	(\$5,000.00)
	196	Interest charged for late payment	5/25/2009	\$108.21
	971	Notice issued CP 0014	5/25/2009	\$0.00
	276	Penalty for late payment of tax	5/25/2009	\$246.33
	170	Penalty for not pre-paying tax	5/25/2009	\$112.00
	150	Tax return filed	5/25/2009	\$42,630.00
	670	Payment	8/14/2009	(\$1,000.00)
	971	Installment agreement established	8/24/2009	\$0.00
	670	Payment	9/21/2009	(\$395.00)
	673	Payment	9/21/2009	(\$105.00)
	672	Removed payment CIVIL PENALTY 200901 999-99-9999	9/21/2009	\$105.00
	670	Payment	10/19/2009	(\$1,000.00)
	706	Credit transferred in from 1040 200712	12/21/2009	(\$500.00)
	670	Payment	12/21/2009	(\$500.00)
	671	Bad check for payment	2/12/2010	\$1,000.00
	673	Payment	2/12/2010	(\$1,000.00)
	670	Payment	3/2/2010	(\$500.00)
	670	Payment	4/3/2010	(\$500.00)
	280	Penalty for bad check	4/5/2010	\$25.00
	670	Payment	4/30/2010	(\$500.00)
	670	Payment	5/10/2010	(\$500.00)
	670	Payment	7/9/2010	(\$500.00)
	670	Payment	8/16/2010	(\$500.00)
	670	Payment	9/20/2010	(\$5,000.00)
	670	Payment	11/4/2010	(\$1,000.00)
	670	Payment	11/5/2010	(\$500.00)
	960	Appointed representative	11/24/2010	\$0.00
	826	Credit transferred out to 1040 200912	2/18/2011	\$19.07
	670	Payment	2/18/2011	(\$14,839.77)
	196	Interest charged for late payment	3/14/2011	\$1,406.25
	971	No longer in installment agreement status	3/14/2011	\$0.00
	971	Notice issued CP 0049	3/14/2011	\$0.00
	276	Penalty for late payment of tax	3/14/2011	\$1,184.91
	961	Removed appointed representative	1/16/2012	\$0.00

IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	960	Appointed representative	4/2/2012	\$0.00
	960	Appointed representative	1/11/2013	\$0.00
2009				
	430	Estimated tax payment	10/5/2009	(\$5,000.00)
	430	Estimated tax payment	12/21/2009	(\$4,580.00)
	460	Extension of time to file ext. Date 10-15-2010	4/15/2010	\$0.00
	806	W-2 or 1099 withholding	4/15/2010	(\$643.00)
	806	W-2 or 1099 withholding	4/15/2010	(\$3.00)
	610	Payment with return	10/21/2010	(\$1,000.00)
	960	Appointed representative	11/24/2010	\$0.00
	670	Payment	11/29/2010	(\$500.00)
	196	Interest charged for late payment	12/13/2010	\$1,197.54
	971	Notice issued CP 0014	12/13/2010	\$0.00
	276	Penalty for late payment of tax	12/13/2010	\$1,782.12
	170	Penalty for not pre-paying tax	12/13/2010	\$1,054.00
	150	Tax return filed	12/13/2010	\$55,026.00
	971	Installment agreement established	1/8/2011	\$0.00
	670	Payment	1/22/2011	(\$1,000.00)
	706	Credit transferred in from 1040 200812	2/18/2011	(\$19.07)
	670	Payment	2/18/2011	(\$23,115.23)
	673	Payment	2/18/2011	(\$45.00)
	672	Removed payment CIVIL PENALTY 201101 999-99-9999	2/18/2011	\$45.00
	670	Payment	4/25/2011	(\$400.00)
	670	Payment	5/24/2011	(\$500.00)
	670	Payment	6/27/2011	(\$400.00)
	670	Payment	8/2/2011	(\$400.00)
	670	Payment	9/6/2011	(\$400.00)
	670	Payment	10/7/2011	(\$400.00)
	670	Payment	11/1/2011	(\$400.00)
	670	Payment	12/8/2011	(\$400.00)
	670	Payment	1/3/2012	(\$400.00)
	961	Removed appointed representative	1/16/2012	\$0.00
	670	Payment	1/30/2012	(\$400.00)
	922	Review of unreported income	2/9/2012	\$0.00
	971	Notice issued CP 0021	2/13/2012	\$0.00
	670	Payment	2/13/2012	(\$2,000.00)
	670	Payment	2/13/2012	(\$400.00)
	670	Payment	2/13/2012	(\$45.00)
	291	Prior tax abated	2/13/2012	(\$483.00)
	670	Payment	3/19/2012	(\$355.00)
	673	Payment	3/19/2012	(\$45.00)
	672	Removed payment CIVIL PENALTY 201201 999-99-9999	3/19/2012	\$45.00
	960	Appointed representative	4/2/2012	\$0.00
	706	Credit transferred in from 1040 201112	4/15/2012	(\$3,027.00)
	670	Payment	4/21/2012	(\$400.00)
	670	Payment	6/4/2012	(\$355.00)
	673	Payment	6/4/2012	(\$45.00)
	672	Removed payment CIVIL PENALTY 201201 999-99-9999	6/4/2012	\$45.00
	670	Payment	6/26/2012	(\$400.00)
	670	Payment	7/23/2012	(\$400.00)
	670	Payment	9/20/2012	(\$400.00)
	670	Payment	10/22/2012	(\$400.00)
	670	Payment	11/23/2012	(\$400.00)
	670	Payment	1/2/2013	(\$355.00)
	673	Payment	1/2/2013	(\$45.00)
	672	Removed payment CIVIL PENALTY 201301 999-99-9999	1/2/2013	\$45.00
	960	Appointed representative	1/11/2013	\$0.00
	670	Payment	2/4/2013	(\$400.00)
	670	Payment	3/11/2013	(\$400.00)
	971	Pending installment agreement	4/22/2013	\$0.00

IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	971	No longer in installment agreement status	7/15/2013	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	9/10/2013	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	9/14/2013	\$0.00
	971	Tax period blocked from automated levy program	9/23/2013	\$0.00
	582	Lien placed on assets due to balance owed	4/11/2014	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	4/15/2014	\$0.00
	520	Bankruptcy or other legal action filed	4/28/2014	\$0.00
	971	Collection due process request received timely	4/28/2014	\$0.00
	971	Installment agreement established	5/2/2014	\$0.00
	360	Fees and other expenses for collection	5/5/2014	\$20.00
2010				
	960	Appointed representative	11/24/2010	\$0.00
	766	Credit to your account	4/15/2011	(\$800.00)
	460	Extension of time to file ext. Date 10-15-2011	4/15/2011	\$0.00
	767	Reduced or removed credit to your account	4/15/2011	\$800.00
	806	W-2 or 1099 withholding	4/15/2011	(\$5,802.00)
	196	Interest charged for late payment	11/21/2011	\$132.89
	971	Notice issued CP 0014	11/21/2011	\$0.00
	276	Penalty for late payment of tax	11/21/2011	\$231.68
	170	Penalty for not pre-paying tax	11/21/2011	\$110.00
	150	Tax return filed	11/21/2011	\$12,394.00
	971	Installment agreement established	12/17/2011	\$0.00
	961	Removed appointed representative	1/16/2012	\$0.00
	960	Appointed representative	4/2/2012	\$0.00
	670	Payment	8/20/2012	(\$400.00)
	290	Additional tax assessed	3/11/2013	\$41,012.00
	240	Miscellaneous penalty IRC 6662(c), (d), (e), (f), (g), or (h) Accuracy-Related Penalty	3/11/2013	\$8,362.00
	971	Notice issued CP 0021	3/11/2013	\$0.00
	922	Review of unreported income	3/13/2013	\$0.00
	971	Pending installment agreement	4/22/2013	\$0.00
	971	No longer in installment agreement status	7/15/2013	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	9/10/2013	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	9/14/2013	\$0.00
	971	Tax period blocked from automated levy program	9/23/2013	\$0.00
	960	Appointed representative	1/20/2014	\$0.00
	582	Lien placed on assets due to balance owed	4/11/2014	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	4/15/2014	\$0.00
	520	Bankruptcy or other legal action filed	4/28/2014	\$0.00
	971	Collection due process request received timely	4/28/2014	\$0.00
	971	Installment agreement established	5/2/2014	\$0.00
2011				
	826	Credit transferred out to 1040 200912	4/15/2012	\$3,027.00
	460	Extension of time to file ext. Date 10-15-2012	4/15/2012	\$0.00
	806	W-2 or 1099 withholding	4/15/2012	(\$9,632.00)
	971	Notice issued CP 0049	12/10/2012	\$0.00
	150	Tax return filed	12/10/2012	\$6,605.00
	960	Appointed representative	1/11/2013	\$0.00
	960	Appointed representative	1/14/2013	\$0.00
	977	Amended return filed	4/12/2013	\$0.00
	971	Amended tax return or claim forwarded for processing	4/12/2013	\$0.00
	290	Additional tax assessed	9/2/2013	\$7,988.00
	196	Interest charged for late payment	9/2/2013	\$348.73
	971	Notice issued CP 0022	9/2/2013	\$0.00
	166	Penalty for filing tax return after the due date	9/2/2013	\$399.40
	971	Tax period blocked from automated levy program	12/30/2013	\$0.00
	582	Lien placed on assets due to balance owed	4/11/2014	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	4/15/2014	\$0.00
	520	Bankruptcy or other legal action filed	4/28/2014	\$0.00
	971	Collection due process request received timely	4/28/2014	\$0.00

IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2012	971	Installment agreement established	5/2/2014	\$0.00
	960	Appointed representative	1/11/2013	\$0.00
	960	Appointed representative	1/14/2013	\$0.00
	460	Extension of time to file ext. Date 10-15-2013	4/15/2013	\$0.00
	806	W-2 or 1099 withholding	4/15/2013	(\$10,048.00)
	610	Payment with return	4/24/2013	(\$1,802.00)
	196	Interest charged for late payment	8/26/2013	\$53.18
	971	Notice issued CP 0014	8/26/2013	\$0.00
	276	Penalty for late payment of tax	8/26/2013	\$126.91
	170	Penalty for not pre-paying tax	8/26/2013	\$91.00
	150	Tax return filed	8/26/2013	\$16,566.00
	971	Tax period blocked from automated levy program	12/30/2013	\$0.00
	420	Examination of tax return	1/24/2014	\$0.00
	582	Lien placed on assets due to balance owed	4/11/2014	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	4/15/2014	\$0.00
	520	Bankruptcy or other legal action filed	4/28/2014	\$0.00
	971	Collection due process request received timely	4/28/2014	\$0.00
	971	Installment agreement established	5/2/2014	\$0.00
	2013	826	Credit transferred out to 1040 201012	4/15/2014
806		W-2 or 1099 withholding	4/15/2014	(\$4,067.00)
971		Notice issued CP 0049	5/5/2014	\$0.00
150		Tax return filed	5/5/2014	\$2,499.00
2014	460	Extension of time to file tax return ext. Date 10-15-2015	3/18/2015	\$0.00
	806	W-2 or 1099 withholding	4/15/2015	(\$1,490.00)
	196	Interest charged for late payment	8/17/2015	\$46.53
	971	Notice issued CP 0014	8/17/2015	\$0.00
	276	Penalty for late payment of tax	8/17/2015	\$113.55
	170	Penalty for not pre-paying tax	8/17/2015	\$20.00
	150	Tax return filed	8/17/2015	\$6,032.00
	971	Tax period blocked from automated levy program	10/19/2015	\$0.00
	971	Installment agreement established	3/1/2016	\$0.00
	971	No longer in installment agreement status	11/14/2016	\$0.00
	971	Tax period blocked from automated levy program	11/21/2016	\$0.00
2015	971	Initial levy imposed	4/17/2017	\$0.00
	460	Extension of time to file tax return ext. Date 10-15-2016	3/21/2016	\$0.00
	806	W-2 or 1099 withholding	4/15/2016	(\$2,088.00)
	196	Interest charged for late payment	8/1/2016	\$57.01
	971	Notice issued CP 0014	8/1/2016	\$0.00
	276	Penalty for late payment of tax	8/1/2016	\$96.04
	170	Penalty for not pre-paying tax	8/1/2016	\$79.00
	150	Tax return filed	8/1/2016	\$6,890.00
	971	Installment agreement established	8/13/2016	\$0.00
	971	No longer in installment agreement status	11/14/2016	\$0.00
	971	Tax period blocked from automated levy program	11/21/2016	\$0.00
	2016	960	Appointed representative	2/8/2017
846		Refund issued	3/29/2017	\$12,549.00
150		Tax return filed	4/10/2017	\$11,100.00
806		W-2 or 1099 withholding	4/15/2017	(\$23,649.00)
2017	960	Appointed representative	2/8/2018	\$0.00
	846	Refund issued	3/29/2018	\$6,148.77
	150	Tax return filed	4/10/2018	\$9,635.21
	806	W-2 or 1099 withholding	4/15/2018	(\$15,783.98)



IRS ACCOUNT SUMMARY

YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2018				
	960	Appointed representative	11/14/2018	\$0.00
	460	Extension of time to file tax return ext. Date 10-15-2019	4/12/2019	\$0.00
	806	W-2 or 1099 withholding	4/15/2019	(\$3,538.00)
	610	Payment with return	4/17/2019	(\$3,347.00)
	150	Tax return filed	5/13/2019	\$6,792.00
	170	Penalty for not pre-paying tax 05-13-2029	5/13/2019	\$93.00
2019				
		Requested Data Not Found.		

CIVIL PENALTY DASHBOARD

YEAR	QUARTER	ACCOUNT BALANCE:	ACCRUED PENALTY AND INTEREST:	ACCOUNT BALANCE PLUS	TRANSCRIPT DATE:
2019	December	(\$2,563.00)	\$0.00	(\$2,563.00)	4/15/18
2019	September	-	-	-	4/15/18
2019	June	-	-	-	4/15/18
2019	March	-	-	-	4/15/18
2018	December	-	-	-	4/15/18
2018	September	-	-	-	4/15/18
2018	June	-	-	-	4/15/18
2018	March	\$19,609.00	\$387.30	\$19,996.30	4/15/18
2017	December	\$23,047.20	\$455.30	\$23,502.50	4/15/18
2017	September	\$22,652.20	\$447.50	\$23,099.70	4/15/18
2017	June	\$19,860.20	\$392.30	\$20,252.50	4/15/18
2017	March	\$23,048.50	\$455.40	\$23,503.90	4/15/18
2016	December	\$15,462.70	\$305.40	\$15,768.10	4/15/18
2016	September	\$20,847.70	\$411.90	\$21,259.60	4/15/18
2016	June	\$14,460.90	\$285.60	\$14,746.50	4/15/18
2016	March	\$11,382.00	\$224.80	\$11,606.80	4/15/18
2015	December	\$18,471.80	\$364.90	\$18,836.70	4/15/18
2015	September	\$18,610.20	\$367.70	\$18,977.90	4/15/18
2015	June	-	-	-	4/15/18
2015	March	-	-	-	4/15/18
2014	December	\$23,217.80	\$458.60	\$23,676.40	4/15/18
2014	September	\$12,947.40	\$255.70	\$13,203.10	4/15/18
2014	June	-	-	-	4/15/18
2014	March	-	-	-	4/15/18
2013	December	\$21,296.80	\$420.70	\$21,717.50	4/15/18
2013	September	-	-	-	4/15/18
2013	June	-	-	-	4/15/18
2013	March	-	-	-	4/15/18
2012	December	-	-	-	4/15/18
2012	September	-	-	-	4/15/18
2012	June	-	-	-	4/15/18
2012	March	-	-	-	4/15/18
2011	December	-	-	-	4/15/18
2011	September	-	-	-	4/15/18
2011	June	-	-	-	4/15/18
2011	March	\$819.28	\$103.12	\$922.40	4/15/18
2010	December	\$307.94	\$38.77	\$346.71	4/15/18
2010	September	-	-	-	4/15/18
2010	June	-	-	-	4/15/18
2010	March	\$2,711.21	\$341.29	\$3,052.50	4/15/18
2009	December	\$2,621.22	\$329.99	\$2,951.21	4/15/18
2009	September	\$2,621.22	\$329.99	\$2,951.21	4/15/18
2009	June	-	-	-	4/15/18
2009	March	\$80.00	\$61.28	\$141.28	4/15/18
2008	December	-	-	-	4/15/18
2008	September	-	-	-	4/15/18
2008	June	-	-	-	4/15/18
2008	March	-	-	-	4/15/18
2007	December	-	-	-	4/15/18
2007	September	\$1,960.90	\$38.73	\$1,999.63	4/15/18
2007	June	\$2,304.72	\$45.53	\$2,350.25	4/15/18
2007	March	\$2,265.22	\$44.75	\$2,309.97	4/15/18
2006	December	\$1,986.02	\$39.23	\$2,025.25	4/15/18
2006	September	\$2,304.85	\$45.54	\$2,350.39	4/15/18
2006	June	\$1,546.27	\$30.54	\$1,576.81	4/15/18
2006	March	\$2,084.77	\$41.19	\$2,125.96	4/15/18
2005	December	\$1,446.09	\$28.56	\$1,474.65	4/15/18
2005	September	\$1,138.20	\$22.48	\$1,160.68	4/15/18
2005	June	\$1,847.18	\$36.49	\$1,883.67	4/15/18
2005	March	\$1,861.02	\$36.77	\$1,897.79	4/15/18
2004	December	-	-	-	4/15/18
2004	September	-	-	-	4/15/18
2004	June	\$2,321.78	\$45.86	\$2,367.64	4/15/18
2004	March	\$1,294.74	\$25.57	\$1,320.31	4/15/18
2003	December	-	-	-	4/15/18
2003	September	-	-	-	4/15/18
2003	June	\$2,129.68	\$42.07	\$2,171.75	4/15/18
2003	March	-	-	-	4/15/18
2002	December	-	-	-	4/15/18
2002	September	-	-	-	4/15/18
2002	June	-	-	-	4/15/18
2002	March	-	-	-	4/15/18
2001	December	-	-	-	4/15/18
2001	September	-	-	-	4/15/18
2001	June	-	-	-	4/15/18
2001	March	-	-	-	4/15/18
2000	December	-	-	-	4/15/18
2000	September	-	-	-	4/15/18
2000	June	-	-	-	4/15/18
2000	March	-	-	-	4/15/18
1999	December	-	-	-	4/15/18
1999	September	-	-	-	4/15/18
1999	June	-	-	-	4/15/18
1999	March	-	-	-	4/15/18
1998	December	-	-	-	4/15/18
1998	September	-	-	-	4/15/18
1998	June	-	-	-	4/15/18
1998	March	-	-	-	4/15/18
1998	December	-	-	-	4/15/18
1998	September	-	-	-	4/15/18
1998	June	-	-	-	4/15/18
1998	March	-	-	-	4/15/18
Total		\$300,566.71	\$6,960.85	\$307,527.56	

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
1997-Mar		No Civil Penalty Transcript Found		
1997-Jun		No Civil Penalty Transcript Found		
1997-Sep		No Civil Penalty Transcript Found		
1997-Dec		No Civil Penalty Transcript Found		
1998-Mar		No Civil Penalty Transcript Found		
1998-Jun		No Civil Penalty Transcript Found		
1998-Sep		No Civil Penalty Transcript Found		
1998-Dec		No Civil Penalty Transcript Found		
1999-Mar		No Civil Penalty Transcript Found		
1999-Jun		No Civil Penalty Transcript Found		
1999-Sep		No Civil Penalty Transcript Found		
1999-Dec		No Civil Penalty Transcript Found		
2000-Mar		No Civil Penalty Transcript Found		
2000-Jun		No Civil Penalty Transcript Found		
2000-Sep		No Civil Penalty Transcript Found		
2000-Dec		No Civil Penalty Transcript Found		
2003-Sep		No Civil Penalty Transcript Found		
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$1,720.50
	971	Notice issued CP 015B	4/7/2008	\$0.00
	706	Credit transferred in from 1040 200712	4/15/2008	(\$283.00)
	706	Credit transferred in from 1040 200712	6/9/2008	(\$1,452.80)
	196	Interest charged for late payment	6/9/2008	\$15.30
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2003-Dec		No Civil Penalty Transcript Found		
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$1,720.50
	971	Notice issued CP 015B	4/7/2008	\$0.00
	706	Credit transferred in from 1040 200712	6/9/2008	(\$347.20)
	971	Notice issued CP 071C	12/15/2008	\$0.00
	706	Credit transferred in from 1040 200812	4/15/2009	(\$1,455.20)
	196	Interest charged for late payment	5/4/2009	\$81.90
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2004-Mar		No Civil Penalty Transcript Found		
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$501.20
	971	Notice issued CP 015B	4/7/2008	\$0.00
	971	Notice issued CP 071C	12/15/2008	\$0.00
	706	Credit transferred in from 1040 200812	4/15/2009	(\$529.70)
	196	Interest charged for late payment	5/4/2009	\$28.50
	960	Appointed representative	2/27/2014	\$0.00

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2004-Jun	960	Appointed representative	4/15/2014	\$0.00
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$1,291.62
	971	Notice issued CP 015B	4/7/2008	\$0.00
	971	Notice issued CP 071C	12/15/2008	\$0.00
	706	Credit transferred in from 1040 200812	4/15/2009	(\$1,365.18)
	196	Interest charged for late payment	5/4/2009	\$73.56
	960	Appointed representative	2/27/2014	\$0.00
2004-Dec				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$3,453.44
	971	Notice issued CP 015B	4/7/2008	\$0.00
	971	Notice issued CP 071C	12/15/2008	\$0.00
	706	Credit transferred in from 1040 200812	4/15/2009	(\$3,154.79)
		Miscellaneous penalty adjustment IRC 6672 Adjustment to Trust Fund		
		Recovery Penalty Balance Due by a Related Taxpayer Payment or		
	241	Reversal of Payment	4/30/2009	(\$298.65)
		Miscellaneous penalty adjustment IRC 6672 Adjustment to Trust Fund		
		Recovery Penalty Balance Due by a Related Taxpayer Payment or		
	241	Reversal of Payment	4/30/2009	(\$197.49)
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	196	Interest charged for late payment	8/17/2009	\$197.49
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2005-Mar				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$3,259.35
	971	Notice issued CP 015B	4/7/2008	\$0.00
	971	Notice issued CP 071C	12/15/2008	\$0.00
		Miscellaneous penalty adjustment IRC 6672 Adjustment to Trust Fund		
		Recovery Penalty Balance Due by a Related Taxpayer Payment or		
	241	Reversal of Payment	4/30/2009	(\$329.81)
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	971	Notice issued CP 071C	12/21/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	706	Credit transferred in from 1040 201012	4/15/2011	(\$1,855.00)
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	360	Fees and other expenses for collection	10/10/2011	\$40.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	670	Payment Installment Agreement	2/21/2012	(\$200.00)
	670	Payment Installment Agreement	3/19/2012	(\$200.00)
	706	Credit transferred in from 1040 201112	4/15/2012	(\$743.00)
	670	Payment Installment Agreement	4/16/2012	(\$200.00)
	196	Interest charged for late payment	4/30/2012	\$28.46
	196	Interest charged for late payment	5/14/2012	\$200.00
	670	Payment Installment Agreement	5/24/2012	(\$200.00)
	196	Interest charged for late payment	6/18/2012	\$200.00
	670	Payment Installment Agreement CIVIL PENALTY 200506	8/20/2012	(\$62.48)
	196	Interest charged for late payment	8/20/2012	\$62.48
	971	No longer in installment agreement status	8/20/2012	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2005-Jun	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$4,641.36
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	971	Notice issued CP 071C	12/21/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	673	Payment	6/18/2012	(\$62.48)
	670	Payment Installment Agreement	6/18/2012	(\$137.52)
	672	Removed payment CIVIL PENALTY 200503	6/18/2012	\$62.48
	670	Payment Installment Agreement	7/23/2012	(\$200.00)
	670	Payment Installment Agreement	8/20/2012	(\$200.00)
	670	Payment Installment Agreement	9/24/2012	(\$200.00)
	670	Payment Installment Agreement	10/22/2012	(\$200.00)
	670	Payment Installment Agreement	10/22/2012	(\$200.00)
	971	No longer in installment agreement status	11/5/2012	\$0.00
	670	Payment Installment Agreement	11/19/2012	(\$200.00)
	971	Notice issued CP 071C	12/17/2012	\$0.00
	670	Payment Installment Agreement	12/17/2012	(\$200.00)
	670	Payment	1/24/2013	(\$200.00)
	670	Payment Installment Agreement	2/22/2013	(\$200.00)
	670	Payment Installment Agreement	3/20/2013	(\$200.00)
	706	Credit transferred in from 1040 201212	4/15/2013	(\$1,384.00)
	670	Payment Levy	5/2/2013	(\$200.00)
	670	Payment Installment Agreement	5/28/2013	(\$200.00)
	670	Payment Installment Agreement	6/19/2013	(\$200.00)
	670	Payment Installment Agreement	7/23/2013	(\$200.00)
	670	Payment Installment Agreement	8/26/2013	(\$200.00)
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$1,014.68
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2005-Sep				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$4,640.45
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	971	Notice issued CP 071C	12/21/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	196	Interest charged for late payment	12/23/2013	\$1,131.69
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2005-Dec				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$3,387.43
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	971	Notice issued CP 071C	12/21/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	1/15/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$826.13
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2006-Jun				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$3,253.74
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	971	Notice issued CP 071C	12/21/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	1/15/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$793.48
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2006-Sep				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$4,177.72
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$1,018.83
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2006-Dec				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$4,566.80
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$1,113.73
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2007-Mar				
	290	Additional tax assessed	4/7/2008	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	4/7/2008	\$5,305.66
	971	Notice issued CP 015B	4/7/2008	\$0.00
	530	Balance due account currently not collectable	7/20/2009	\$0.00
	531	Account currently considered collectable	9/14/2010	\$0.00
	971	Tax period blocked from automated levy program	11/15/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$1,293.94
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2007-Jun				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$2,697.11
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$330.22
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2007-Sep				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$1,396.82
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$171.03
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2007-Dec				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$1,858.22
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$227.52
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2008-Jun				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$3,617.62
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$227.52
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2008-Jun				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$3,617.62
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	971	Payment	12/17/2012	\$0.00
	670		9/9/2013	(\$350.00)



CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$439.90
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2008-Sep				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$2,008.85
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$245.96
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
	960	Appointed representative	4/15/2014	\$0.00
2008-Dec				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$2,230.88
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$273.15
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2009-Mar				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$2,546.74
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$0.00
	971	Notice issued CP 071C	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2009-Mar				
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$2,546.74
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/31/2011	\$0.00
	582	Lien placed on assets due to balance owed	9/9/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/13/2011	\$0.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	Installment agreement established	1/17/2012	\$0.00
	971	No longer in installment agreement status	11/5/2012	\$0.00
	971	Notice issued CP 071C	12/17/2012	\$0.00
	530	Balance due account currently not collectable	10/29/2013	\$0.00
	196	Interest charged for late payment	12/23/2013	\$311.80
	971	Notice issued CP 071C	12/23/2013	\$0.00

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2009-Jun	960	Appointed representative	2/27/2014	\$0.00
	290	Additional tax assessed	6/21/2010	\$0.00
	240	Miscellaneous penalty IRC 6672 Trust Fund Recovery Penalty	6/21/2010	\$681.22
	971	Notice issued CP 015B	6/21/2010	\$0.00
	971	Tax period blocked from automated levy program	10/18/2010	\$0.00
	971	Pending installment agreement	7/25/2011	\$0.00
	582	Lien placed on assets due to balance owed	8/5/2011	\$0.00
	971	Issued notice of lien filing and right to Collection Due Process hearing	8/11/2011	\$0.00
	971	Collection due process Notice of Intent to Levy -- issued	8/29/2011	\$0.00
	360	Fees and other expenses for collection	8/29/2011	\$20.00
	971	Installment agreement established	12/1/2011	\$0.00
	971	No longer in installment agreement status	1/17/2012	\$0.00
	971	Notice issued CP 071C	11/5/2012	\$0.00
	530	Balance due account currently not collectable	12/17/2012	\$0.00
	196	Interest charged for late payment	10/29/2013	\$0.00
	971	Notice issued CP 071C	12/23/2013	\$64.87
	960	Appointed representative	12/23/2013	\$0.00
	960	Appointed representative	2/27/2014	\$0.00
2014-Jun			4/15/2014	\$0.00
2014-Sep		No Civil Penalty Transcript Found		
2014-Dec		No Civil Penalty Transcript Found		
2015-Mar		No Civil Penalty Transcript Found		
2015-Jun		No Civil Penalty Transcript Found		
2015-Sep		No Civil Penalty Transcript Found		
2015-Dec		No Civil Penalty Transcript Found		
2016-Mar		No Civil Penalty Transcript Found		
2016-Jun		No Civil Penalty Transcript Found		
2016-Sep		No Civil Penalty Transcript Found		
2016-Dec		No Civil Penalty Transcript Found		
2017-Mar		No Civil Penalty Transcript Found		
2017-Jun		No Civil Penalty Transcript Found		
2017-Sep		No Civil Penalty Transcript Found		
2017-Dec		No Civil Penalty Transcript Found		
2018-Mar		No Civil Penalty Transcript Found		
2018-Jun		No Civil Penalty Transcript Found		
2018-Sep		No Civil Penalty Transcript Found		
2018-Dec		No Civil Penalty Transcript Found		
2019-Mar		No Civil Penalty Transcript Found		

CIVIL PENALTY TRANSACTIONS

YEAR/ QUARTER	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2019-Jun		No Civil Penalty Transcript Found		
2019-Sep		No Civil Penalty Transcript Found		
2019-Dec		No Civil Penalty Transcript Found		

RED FLAG

Red Flag Report: Red and yellow flags are only an indicator. These flags should be used to identify those areas of a tax return that may trigger an audit by the IRS. The IRS uses a formula known as the DIF score. The DIF score logic is confidential. Audit Detective looks for individual areas on your return that may increase your chance of an audit. This does not mean the return will be audited or that you will lose an audit. This is merely an indicator. If audited you will be required to prove your tax position.

The IRS checks all returns submitted for errors. Most of the time they reject a return until the errors are fixed. In certain cases the IRS modifies your return and notifies you via mail of the change. These changes may have adverse effects on your return. This report checks for any changes the IRS made to your return at the time of filing.

	2015	2016	2017	2018
TAX RETURN FILED:	Amended	Original	No	No
FORM NUMBER:	1040	1040	-	-
None Found				

Audit Risk	Green Flag=	low	Yellow Flag=	med	Red Flag=	high	2018	Flag
RED FLAG REPORT	2015	Original	2016	Original	2017	Original	2018	Original
TAX RETURN FILED:	Original		Original		Original		Original	
ADJUSTED GROSS INCOME:								
Yellow Flag: You are 50% more likely to be audited if your AGI is less than \$25K or more than \$100K. Red Flag: None								
ADJUSTED GROSS INCOME:	\$98,937	low	\$80,064	low	\$98,937	low	\$80,064	low
SCHEDULE A - TOTAL DEDUCTION PERCENTAGE								
Yellow Flag: Itemized deductions are more than 50% of your AGI Red Flag: Itemized deductions are more than 70% of AGI								
TOTAL ITEMIZED DEDUCTIONS:	\$26,898	low	\$28,591	low	\$26,898	low	\$28,591	low
PERCENTAGE OF AGI	27.2%	low	35.7%	low	27.2%	low	35.7%	low
MORTGAGE INTEREST								
Yellow Flag: None								
Red Flag: Sch A mortgage interest more than \$1,500 and Sch C expense for business use of home more than \$1,500								
SCHEDULE A MORTGAGE INTEREST	\$14,483		\$13,628		\$14,483		\$13,628	
EXPENSE FOR BUSINESS USE OF HOME:	\$0	low	\$0	low	\$0	low	\$0	low
SCHEDULE A CONTRIBUTIONS								
Yellow Flag: Sch A total contributions are more than 15% of AGI								
Red Flag: Sch A total contributions are more than 25% of AGI								
SCH A TOTAL CONTRIBUTIONS:	\$4,500	low	\$2,616	low	\$4,500	low	\$2,616	low
PERCENTAGE OF AGI	4.5%	low	3.3%	low	4.5%	low	3.3%	low
SCHEDULE A EMPLOYEE EXPENSES								
Yellow Flag: Sch A unreimbursed employee business expense more than \$5,000								
Red Flag: Sch A unreimbursed employee business expense more than \$10,000								
UNREIMBURSED EMPLOYEE EXPENSE AMOUNT:	\$6,560	med	\$6,430	med	\$6,560	med	\$6,430	med
SCHEDULE A MEDICAL DEDUCTIONS								
Yellow Flag: Medical Deduction greater than 20% of AGI Red Flag: Medical Deductions greater than 50%								
MEDICAL AND DENTAL EXPENSES:	\$7,199		\$8,518		\$7,199		\$8,518	
AGI PERCENTAGE LIMITATION:	\$0		\$2,513		\$0		\$2,513	
NET MEDICAL DEDUCTION:	0.0%	low	3.1%	low	0.0%	low	3.1%	low
AGI PERCENTAGE OF AGI								
SCHEDULE C INCOME WITH EIC								
Yellow Flag: Sch C income between \$5k and \$20k and EIC greater than \$500								
Red Flag: Sch C income between \$8k and \$16k and EIC greater than \$1000								
BUSINESS INCOME OR LOSS (Schedule C):	\$50,670		\$18,158		\$50,670		\$18,158	
EARNED INCOME CREDIT:	\$0	low	\$0	low	\$0	low	\$0	low
SCHEDULE C CAR AND TRUCK EXPENSE								
Yellow Flag: Mileage greater than 20k Red Flag: Mileage greater than 30k								
CAR AND TRUCK EXPENSES:	\$4,662	low	\$4,746	low	\$4,662	low	\$4,746	low
SCHEDULE C BUSINESS NAICS CODE								
Yellow Flag: None Red Flag: NAICS Miscellaneous Code 999999 used								
NAICS CODE:	541100	low	-		541100	high	-	
SCHEDULE C BUSINESS USE OF HOME								
Yellow Flag: Anytime this deduction is claimed Red Flag: None								
EXP FOR BUSINESS USE OF HOME:	\$0	low	\$0	low	\$0	low	\$0	low
SCHEDULE E LOSS WITH NO INCOME ON RENTAL								
Yellow Flag: None Red Flag: If rents greater than \$1k and there is a loss								
TOTAL RENTS RECEIVED:	\$0		\$0		\$0		\$0	
RENT & ROYALTY LOSSES:	\$0	low	\$0	low	\$0	low	\$0	low

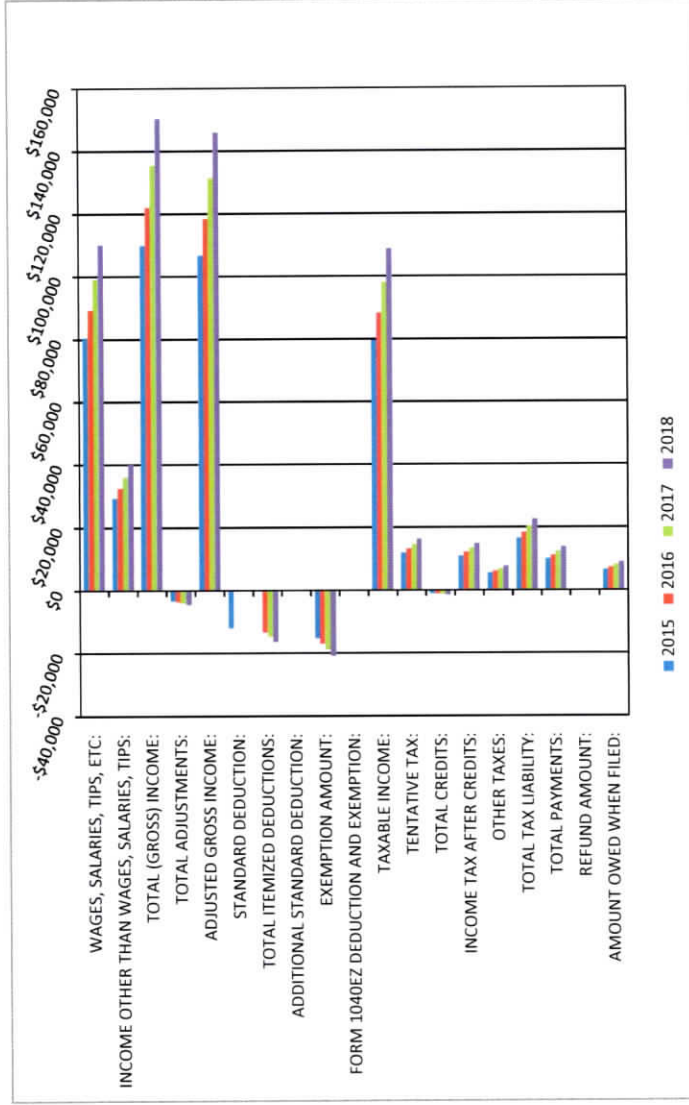
PAYMENT HISTORY

TAX YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2018	610	Payment with return	4/17/2019	(\$3,347.00)
2018	806	W-2 or 1099 withholding	4/15/2019	(\$3,538.00)
2017	610	Payment with return	4/21/2018	(\$3,720.00)
2017	806	W-2 or 1099 withholding	4/15/2018	(\$3,498.00)
2013	670	Payment	4/17/2017	(\$3,482.00)
2016	660	Estimated tax payment	4/4/2017	(\$1,650.00)
2015	430	Estimated tax payment	1/21/2017	(\$1,572.00)
2015	430	Estimated tax payment	10/23/2016	(\$1,572.00)
2015	430	Estimated tax payment	7/23/2016	(\$1,572.00)
2015	430	Estimated tax payment	3/23/2016	(\$400.00)
2014	610	Payment with return	4/24/2015	(\$1,802.00)
2013	670	Payment	4/17/2015	(\$3,482.00)
2014	660	Estimated tax payment	4/4/2015	(\$1,650.00)
2013	430	Estimated tax payment	1/21/2014	(\$1,572.00)
2013	430	Estimated tax payment	9/23/2013	(\$1,572.00)
2013	430	Estimated tax payment	9/23/2013	(\$1,572.00)
2013	430	Estimated tax payment	9/23/2013	(\$400.00)
2012	610	Payment with return	4/24/2013	(\$1,802.00)
2009	670	Payment	3/11/2013	(\$400.00)
2009	670	Payment	2/4/2013	(\$400.00)
2009	670	Payment	1/2/2013	(\$355.00)
2009	673	Payment	1/2/2013	(\$45.00)
2009	670	Payment	11/23/2012	(\$400.00)
2009	670	Payment	10/22/2012	(\$400.00)
2009	670	Payment	9/20/2012	(\$400.00)
2010	670	Payment	8/20/2012	(\$400.00)
2009	670	Payment	7/23/2012	(\$400.00)
2009	670	Payment	6/26/2012	(\$400.00)
2009	670	Payment	6/4/2012	(\$355.00)
2009	673	Payment	6/4/2012	(\$45.00)
2009	670	Payment	4/21/2012	(\$400.00)
2009	670	Payment	3/19/2012	(\$355.00)
2009	673	Payment	3/19/2012	(\$45.00)
2009	670	Payment	2/13/2012	(\$2,000.00)
2009	670	Payment	2/13/2012	(\$400.00)
2009	670	Payment	2/13/2012	(\$45.00)
2009	670	Payment	1/30/2012	(\$400.00)
2009	670	Payment	1/3/2012	(\$400.00)
2009	670	Payment	12/8/2011	(\$400.00)
2009	670	Payment	11/1/2011	(\$400.00)
2009	670	Payment	10/7/2011	(\$400.00)
2009	670	Payment	9/6/2011	(\$400.00)
2009	670	Payment	8/2/2011	(\$400.00)
2009	670	Payment	6/27/2011	(\$400.00)
2009	670	Payment	5/24/2011	(\$500.00)
2009	670	Payment	4/25/2011	(\$400.00)
2008	670	Payment	2/18/2011	(\$14,839.77)
2009	673	Payment	2/18/2011	(\$23,115.23)
2009	670	Payment	2/18/2011	(\$45.00)
2009	670	Payment	1/22/2011	(\$1,000.00)
2009	670	Payment	11/29/2010	(\$500.00)
2008	670	Payment	11/5/2010	(\$500.00)
2008	670	Payment	11/4/2010	(\$1,000.00)
2009	610	Payment with return	10/21/2010	(\$1,000.00)
2008	670	Payment	9/20/2010	(\$5,000.00)

PAYMENT HISTORY

TAX YEAR	CODE	EXPLANATION OF TRANSACTION	DATE	AMOUNT
2008	670	Payment	8/16/2010	(\$500.00)
2008	670	Payment	7/9/2010	(\$500.00)
2008	670	Payment	5/10/2010	(\$500.00)
2008	670	Payment	4/30/2010	(\$500.00)
2008	670	Payment	4/3/2010	(\$500.00)
2008	670	Payment	3/2/2010	(\$500.00)
2008	673	Payment	2/12/2010	(\$1,000.00)
2007	670	Payment	12/21/2009	(\$1,113.91)
2008	670	Payment	12/21/2009	(\$500.00)
2009	430	Estimated tax payment	12/21/2009	(\$4,580.00)
2007	670	Payment	11/20/2009	(\$500.00)
2008	670	Payment	10/19/2009	(\$1,000.00)
2009	430	Estimated tax payment	10/5/2009	(\$5,000.00)
2008	670	Payment	9/21/2009	(\$385.00)
2008	673	Payment	9/21/2009	(\$105.00)
2007	640	Advance payment of tax owed Miscellaneous Payment	8/14/2009	(\$100.00)
2008	670	Payment	8/14/2009	(\$1,000.00)
2008	610	Payment with return	4/21/2009	(\$5,000.00)
2008	430	Estimated tax payment	1/20/2009	(\$4,070.00)
2007	197	Reduced or removed interest charged for late payment	11/10/2008	(\$9.53)
2007	277	Reduced or removed penalty for late payment of tax	11/10/2008	(\$14.86)
2007	610	Payment with return	10/19/2008	(\$3,142.00)
2008	430	Estimated tax payment	9/18/2008	(\$1,440.00)
2008	430	Estimated tax payment	6/15/2008	(\$2,880.00)
2007	670	Payment	4/15/2008	(\$5,411.00)
2002	640	Advance payment of tax owed Miscellaneous Payment	10/20/2005	(\$4,128.69)
2003	670	Payment	2/23/2005	(\$121.48)
2003	610	Payment with return	1/5/2005	(\$3,609.00)

TAX RETURN OVERVIEW



TAX SUMMARY	2015	2016	2017	2018
RETURN TRANSCRIPT DATE	5/1/2018	5/1/2018	5/1/2018	5/1/2018
TAX RETURN FILED:	Original	Original	Amended	Original
TYPE OF RETURN:	1040	1040	1040	1040
WAGES, SALARIES, TIPS, ETC:	\$80,570	\$89,433	\$99,270	\$110,190
INCOME OTHER THAN WAGES, SALARIES, TIPS:	\$29,345	\$32,573	\$36,156	\$40,133
TOTAL (GROSS) INCOME:	\$109,915	\$122,006	\$135,426	\$150,323
TOTAL ADJUSTMENTS:	(\$3,227)	(\$3,562)	(\$3,976)	(\$4,413)
ADJUSTED GROSS INCOME:	\$106,688	\$118,424	\$131,450	\$145,910
STANDARD DEDUCTION:	(\$11,900)	(\$13,209)	(\$14,662)	(\$16,275)
TOTAL ITEMIZED DEDUCTIONS:	\$0	\$0	\$0	\$0
ADDITIONAL STANDARD DEDUCTION:	(\$15,200)	(\$16,872)	(\$18,728)	(\$20,788)
EXEMPTION AMOUNT:	\$0	\$0	\$0	\$0
FORM 1040EZ DEDUCTION AND EXEMPTION:	(\$15,200)	(\$16,872)	(\$18,728)	(\$20,788)
TAXABLE INCOME:	\$91,488	\$101,552	\$112,722	\$125,122
TENTATIVE TAX:	\$18,298	\$20,310	\$22,544	\$25,024
TOTAL CREDITS:	(\$3,644)	(\$4,167)	(\$4,681)	(\$5,204)
INCOME TAX AFTER CREDITS:	\$14,654	\$16,143	\$17,863	\$19,820
OTHER TAXES:	\$1,000	\$1,100	\$1,200	\$1,300
TOTAL TAX LIABILITY:	\$15,654	\$17,243	\$19,063	\$21,120
TOTAL PAYMENTS:	\$10,048	\$11,153	\$12,380	\$13,742
REFUND AMOUNT:	\$5,606	\$6,090	\$6,683	\$7,378
AMOUNT OWED WHEN FILED:	\$0	\$0	\$0	\$0



INCOME DOCUMENTS

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Transcript Date:	4/19/2018	4/19/2018	4/19/2018	4/19/2018	4/19/2018	4/19/2018	4/19/2018	4/19/2018	4/19/2018	4/19/2018
W-2	1	1	1	1	0	1	0	0	0	0
1098	3	3	3	3	3	3	1	1	2	0
1098-E	0	0	0	0	1	0	0	0	0	0
5498	0	0	2	2	2	2	2	0	0	2
1099-B	2	2	23	14	8	20	0	0	11	0
1099-C	0	0	0	0	0	0	1	3	0	0
1099-DIV	1	3	3	3	2	2	1	0	0	6
1099-INT	1	1	1	0	1	1	1	1	5	0
1099-MISC	8	12	12	13	15	8	6	6	0	3
1099-R	1	0	0	1	0	3	0	0	0	0
TOTAL	17	22	45	37	32	40	12	11	18	11

Total Corrected and/or Amended Income Documents										
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
1099-MISC	0	0	0	0	1	0	0	0	0	0
TOTAL	0	0	0	0	1	0	0	0	0	0

WAGE INCOME SUMMARY

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Totals
Federal Tax Withheld:	\$0	\$3	\$9	\$3	\$0	\$2,070	\$0	\$0	\$0	\$3	\$2,088
Wages:	\$1,009	\$962	\$229	\$33	\$0	\$37	\$0	\$0	\$1,080	\$1,029	\$4,379
Allocated Tips:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Interest:	\$21	\$0	\$113	\$0	\$27	\$24	\$12	\$2	\$22	\$0	\$221
Mortgage Interest Paid:	\$19,572	\$34,173	\$31,307	\$21,518	\$16,769	\$13,051	\$1,521	\$713	\$20,942	\$36,565	\$196,131
Points Paid:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prior Year Refund:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Savings Bonds:	\$0	\$6,004	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$6,424	\$12,428
Dividends:	\$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
IRA Contributions:	\$0	\$0	\$2,250	\$3,000	\$500	\$0	\$0	\$0	\$0	\$0	\$5,750
Non-employee Compensation:	\$64,766	\$138,668	\$202,475	\$240,068	-	\$114,849	\$154,270	\$58,171	\$69,300	\$148,375	\$1,190,941
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:	\$1,474	\$0	\$0	\$1,820	\$0	\$26,580	\$0	\$0	\$1,577	\$0	\$31,451
Taxable Amount:	\$1,474	\$0	\$0	\$1,820	\$0	\$26,580	\$0	\$0	\$1,577	\$0	\$31,451
Ordinary Dividends:	\$680	\$2,892	\$3,529	\$2,533	\$855	\$224	-	-	\$728	\$3,094	\$14,535
Ordinary Income K-1:	-	-	-	-	-	-	-	-	-	-	\$0
Roth IRA Contribution:	-	-	-	-	-	-	-	-	-	-	\$0
Fair Market Value:	-	-	\$11,754	\$15,415	\$17,402	\$1,569	\$1,698	-	-	-	\$47,838
Section 179 Expense:	-	-	-	-	-	-	-	-	-	-	\$0
FICA Tax Withheld:	\$62	\$59	\$14	\$2	-	\$1	-	-	\$66	\$63	\$267
Medicare Withheld:	\$14	\$13	\$3	-	-	-	-	-	\$15	\$14	\$59
Medicare Wages:	\$1,009	\$962	\$229	\$33	-	\$37	-	-	\$1,080	\$1,029	\$4,379
Taxable FICA Wages:	\$1,009	\$962	\$229	\$33	-	\$37	-	-	\$1,080	\$1,029	\$4,379
Stocks & Bonds:	\$1,623	\$900	\$9,860	\$45,522	\$9,557	\$34,127	-	-	\$1,737	\$963	\$104,289
Simple Contributions:	-	-	-	-	-	-	-	-	-	-	\$0
Gross Winnings:	-	-	-	-	-	-	-	-	-	-	\$0
Taxable FICA Tips:	-	-	-	-	-	-	-	-	-	-	\$0
Student Loan Interest:	-	-	-	-	\$154	-	-	-	-	-	\$154
Deferred Compensation:	-	-	-	-	-	-	-	-	-	-	\$0
Foreign Tax Paid:	-	-	-	\$1	\$1	-	-	-	-	-	\$2
Qualified Dividends:	\$645	\$2,873	\$3,477	\$2,527	\$849	\$224	-	-	\$690	\$3,074	\$14,359
Scholarships or Grants:	-	-	-	-	-	-	-	-	-	-	\$0
Rent:	\$8,800	\$9,650	\$10,349	\$9,600	\$6,353	\$10,200	\$8,450	-	\$9,416	\$10,326	\$83,144

WAGE INCOME SUMMARY

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Totals
Unemployment Compensation:	-	-	-	-	-	-	-	-	-	-	\$0
Other Income:	-	\$10	-	\$12	\$3,429	-	-	-	-	\$11	\$3,462
Fishing Income:	-	-	-	-	-	-	-	-	-	-	\$0
Ordinary Income K-1 (Original only):	-	-	-	-	-	-	-	-	-	-	\$0
Ordinary Income K-1 (Corrected/Amended):	-	-	-	-	-	-	-	-	-	-	\$0
Interest Forfeiture:	-	-	-	-	-	-	-	-	-	-	\$0
Rollover IRA Contributions:	-	-	-	-	-	-	-	-	-	-	\$0
Qualified Tuition and Related	-	-	-	-	-	-	-	-	-	-	\$0
Guarantee Payments:	-	-	-	-	-	-	-	-	-	-	\$0
Amount of Debit Cancelled:	-	-	-	-	-	-	-	-	-	-	\$0
Employer's Contribution to Simple Account:	-	-	-	-	-	-	-	-	-	-	\$0
Ordinary Dividends (Original only):	-	-	-	-	-	-	-	-	-	-	\$0
Ordinary Dividends (Corrected/Amended):	-	-	-	-	-	-	-	-	-	-	\$0
SEP Contributions:	-	-	\$10,040	-	-	-	-	-	-	-	\$10,040
Real Estate:	-	-	-	-	-	-	-	-	-	-	\$0
Code "V" Income from exercise of non- statutory stock options:	-	-	-	-	-	-	-	-	-	-	\$0
Non Taxable Distribution:	-	-	-	-	-	-	-	-	-	-	\$0
Post May 5 Capital Gain Distribution:	-	-	-	-	-	-	-	-	-	-	\$0
Medical Payments:	-	-	-	-	-	-	-	-	-	-	\$0
Deferred Compensation (Original	-	-	-	-	-	-	-	-	-	-	\$0
Deferred Compensation (Corrected/Amended):	-	-	-	-	-	-	-	-	-	-	\$0
Attorney Fee:	-	-	-	-	-	-	-	-	-	-	\$0
Debt Outstanding:	-	-	-	-	-	-	-	-	-	-	\$0
Property Fair Market Value:	-	-	-	-	-	-	-	-	-	-	\$0

TOTAL IRA DISTRIBUTIONS:	\$0	\$0	\$0	\$0
TAXABLE IRA DISTRIBUTIONS:	\$0	\$0	\$0	\$0
TOTAL PENSIONS AND ANNUITIES:	\$0	\$0	\$0	\$0
TAXABLE PENSION/ANNUITY AMOUNT:	\$0	\$0	\$0	\$0
RENT/ROYALTY/PARTNERSHIP/ESTATE (SCH E):		\$51,236	(\$14,562)	(\$16,018)
RENT/ROYALTY INCOME/LOSS:	(\$13,362)	\$51,236	(\$14,562)	(\$16,018)
ESTATE/TRUST INCOME/LOSS:	\$0	\$0	\$0	\$0
PARTNERSHIP/S-CORP INCOME/LOSS:	\$0	\$0	\$0	\$0
FARM INCOME OR LOSS (Schedule F):	\$0	\$0	\$0	\$0
UNEMPLOYMENT COMPENSATION:	\$0	\$0	\$0	\$0
TOTAL SOCIAL SECURITY BENEFITS:	\$0	\$0	\$0	\$0
TAXABLE SOCIAL SECURITY BENEFITS:	\$0	\$0	\$0	\$0
OTHER INCOME:	\$0	\$0	\$12,365	\$2,145
SCHEDULE EIC SE INCOME:	\$0	\$0	\$0	\$0
SCHEDULE EIC EARNED INCOME:	\$0	\$0	\$0	\$0
SCH EIC DISQUALIFIED INC:	\$0	\$0	\$0	\$0
TOTAL INCOME:	\$109,915	\$120,907	\$132,997	\$146,297

## ADJUSTMENTS TO INCOME

ADJUSTMENT TO INCOME	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
TOTAL INCOME:	\$109,915	\$120,907	\$132,997	\$146,297
EDUCATOR EXPENSES:	\$0	\$0	\$0	\$0
RESERVIST AND OTHER BUSINESS EXPENSE:	\$0	\$0	\$0	\$0
JURY DUTY PAY DEDUCTION:	\$0	\$0	\$0	\$0
HEALTH SAVINGS ACCT DEDUCTION:	\$0	\$0	\$0	\$0
MOVING EXPENSES: F3903:	\$0	\$0	\$0	\$0
SELF EMPLOYMENT TAX DEDUCTION:	\$3,227	\$2,600	\$3,105	\$4,703
KEOGH/SEP CONTRIBUTION DEDUCTION:	\$0	\$0	\$0	\$0
SELF-EMP HEALTH INS DEDUCTION:	\$0	\$0	\$0	\$0
EARLY WITHDRAWAL OF SAVINGS PENALTY:	\$0	\$0	\$0	\$0
ALIMONY PAID SSN:	999-99-9999	999-99-9999	999-99-9999	999-99-9999
ALIMONY PAID:	\$26,952	\$45,632	\$78,541	\$98,523
IRA DEDUCTION:	\$0	\$0	\$0	\$0
STUDENT LOAN INTEREST DEDUCTION:	\$0	\$0	\$0	\$0
TUITION AND FEES DEDUCTION:	\$0	\$0	\$0	\$0
DOMESTIC PRODUCTION ACTIVITIES DEDUCTION:	\$0	\$0	\$0	\$0
OTHER ADJUSTMENTS:	\$0	\$0	\$0	\$0
ARCHER MSA DEDUCTION:	\$0	\$0	\$0	\$0
TOTAL ADJUSTMENTS:	\$3,227	\$48,232	\$81,646	\$103,226
ADJUSTED GROSS INCOME:	\$106,688	\$72,675	\$51,351	\$43,071

TAX SUMMARY

TAX	2015	2016	2017	2018
TAX RETURN FILED:	Original	Amended	Original	Original
ADJUSTED GROSS INCOME:	\$106,688	\$113,089	\$119,875	\$127,067
65-OR-OVER:	NO	NO	NO	NO
BLIND:	NO	NO	NO	NO
SPOUSE 65-OR-OVER:	NO	NO	NO	NO
SPOUSE BLIND:	NO	NO	NO	NO
TAX TABLE INCOME:	\$94,788	\$100,475	\$106,504	\$112,894
STANDARD DEDUCTION:	\$11,900	\$12,614	\$13,371	\$14,173
ADDITIONAL STANDARD DEDUCTION:	\$0	\$0	\$0	\$0
TOTAL ITEMIZED DEDUCTIONS:	-	-	-	-
EXEMPTION AMOUNT:	\$15,200	\$16,112	\$17,079	\$18,103
TAXABLE INCOME:	\$79,588	\$84,363	\$89,425	\$94,791
TAX				
TENTATIVE TAX:	\$11,954	\$12,671	\$13,432	\$14,237
FORM 8814 ADDITIONAL TAX AMOUNT:	\$0	\$0	\$0	\$0
TAX ON INCOME LESS SOC SEC INCOME PER COMPUTER:	\$0	\$0	\$0	\$0
FORM 6251 ALTERNATIVE MINIMUM TAX:	\$0	\$0	\$0	\$0
INCOME TAX:	\$11,954	\$12,671	\$13,432	\$14,237
OTHER TAXES				
SE TAX:	\$5,612	\$5,949	\$6,306	\$6,684
SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS:	\$0	\$0	\$0	\$0
TAX ON QUALIFIED PLANS F5329 (PR):	\$0	\$0	\$0	\$0
IRAF TAX PER COMPUTER:	\$0	\$0	\$0	\$0
TP TAX FIGURES (REDUCED BY IRAF) PER COMPUTER:	\$16,566	\$17,560	\$18,614	\$19,730
ADVANCED EARNED INCOME CREDIT:	\$0	\$0	\$0	\$0
ADVANCED EARNED INCOME CREDIT AND OTHER EMPLOYMENT TAXES:	-	-	-	-
UNPAID FICA ON REPORTED TIPS:	\$0	\$0	\$0	\$0
FORM 4970 ACCUMULATION DISTRIBUTION OF TRUSTS:	-	-	-	-
RECAPTURE TAX: F8611:	\$0	\$0	\$0	\$0
HOUSEHOLD EMPLOYMENT TAXES:	\$0	\$0	\$0	\$0
RECAPTURE TAXES:	\$0	\$0	\$0	\$0
TOTAL TAX LIABILITY TP FIGURES:	\$16,566	\$17,560	\$18,614	\$19,730

NON-REFUNDABLE CREDIT SUMMARY

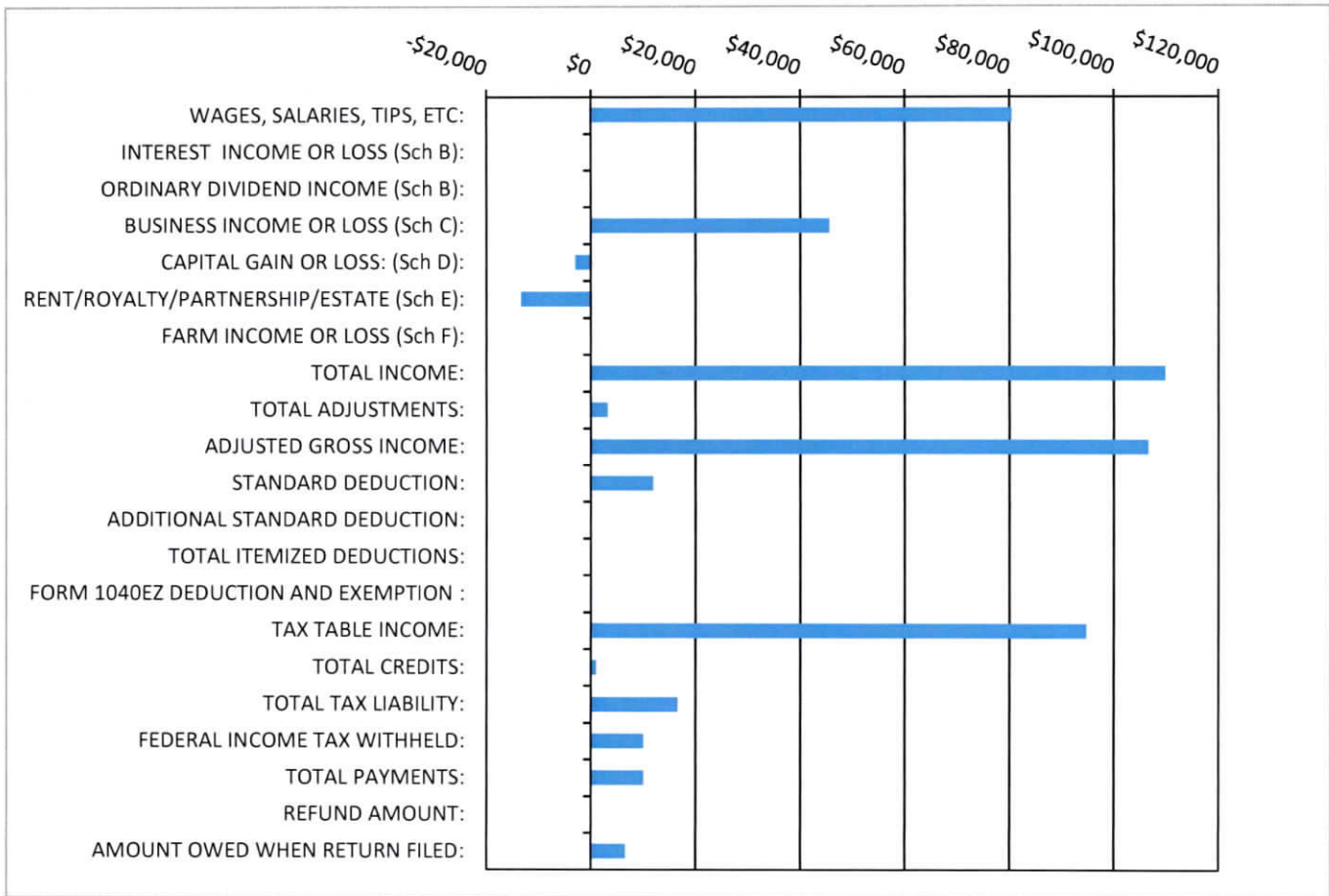
CREDITS	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
FOREIGN INCOME EXCLUSION:	\$0	\$0	\$0	\$0
FOREIGN INCOME EXCLUSION TAX:	\$0	\$0	\$0	\$0
CHILD & DEPENDENT CARE CREDIT:	\$0	\$0	\$0	\$0
CREDIT FOR ELDERLY AND DISABLED:	\$0	\$0	\$0	\$0
EDUCATION CREDIT:	\$0	\$0	\$0	\$0
GROSS EDUCATION CREDIT:	\$0	\$0	\$0	\$0
RETIREMENT SAVINGS CONTRIBUTION CREDIT:	\$0	\$0	\$0	\$0
RESIDENTIAL ENERGY CREDIT:	\$0	\$0	\$0	\$0
CHILD TAX CREDIT:	\$1,784	\$2,000	\$2,000	\$1,432
ADOPTION CREDIT: F8839:	\$0	\$0	\$0	\$0
DC 1ST TIME HOMEBUYERS CREDIT:	\$0	\$0	\$0	\$0
FORM 8396 MORTGAGE CERTIFICATE CREDIT:	\$0	\$0	\$0	\$0
F3800, F8801 AND OTHER CREDIT AMOUNT:	\$0	\$0	\$0	\$0
FORM 3800 GENERAL BUSINESS CREDITS:	\$0	\$0	\$0	\$0
FORM 1040C CREDIT:	-	-	-	-
PRIOR YR MIN TAX CREDIT: F8801:	\$0	\$0	\$0	\$0
F8834 ELECTRIC VEHICLE CREDIT AMOUNT:	\$0	\$0	\$0	\$0
F8936 ELECTRIC MOTOR VEHICLE CREDIT AMOUNT:	\$0	\$0	\$0	\$0
F8910 ALTERNATIVE MOTOR VEHICLE CREDIT AMOUNT:	\$0	\$0	\$0	\$0
OTHER CREDITS:	\$0	\$0	\$0	\$0
TOTAL CREDITS:	\$1,784	\$2,000	\$2,000	\$1,432
INCOME TAX AFTER CREDITS:	\$10,954	\$12,268	\$13,741	\$15,390

PAYMENTS SUMMARY

PAYMENTS	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
FEDERAL INCOME TAX WITHHELD:	\$10,048	\$8,956	\$16,748	\$6,789
COBRA PREMIUM SUBSIDY:	\$0	\$0	\$0	\$0
ESTIMATED TAX PAYMENTS:	\$0	\$0	\$0	\$0
MAKING WORK PAY AND GOVT RET CREDIT:	\$0	\$0	\$0	\$0
REFUNDABLE EDUCATION CREDIT:	\$800	\$1,100	\$1,000	\$1,050
EARNED INCOME CREDIT:	\$0	\$0	\$0	\$0
EARNED INCOME CREDIT NONTAXABLE COMBAT PAY:	\$0	\$0	\$0	\$0
FORM 8812 NONTAXABLE COMBAT PAY:	\$0	\$0	\$0	\$0
SCHEDULE M NONTAXABLE COMBAT PAY:	\$0	\$0	\$0	\$0
EXCESS SOCIAL SECURITY & RRTA TAX WITHHELD:	\$0	\$0	\$0	\$0
TOT SS/MEDICARE WITHHELD: F8812:	-	-	-	-
FORM 8812 ADDITIONAL CHILD TAX CREDIT:	\$0	\$0	\$0	\$0
AMOUNT PAID WITH FORM 4868:	\$0	\$0	\$0	\$0
FORM 2439 REGULATED INVESTMENT COMPANY CREDIT:	\$0	\$0	\$0	\$0
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS:	\$0	\$0	\$0	\$0
HEALTH COVERAGE TX CR: F8885:	\$0	\$0	\$0	\$0
FORM 8801 REFUNDABLE CREDIT FOR PRIOR YEAR MIN. TAX:	\$0	\$0	\$0	\$0
FIRST TIME HOME BUYER CREDIT:	\$0	\$0	\$0	\$0
PRIMARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:	\$0	\$0	\$0	\$0
SECONDARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:	\$0	\$0	\$0	\$0
RECOVERY REBATE CREDIT:	-	-	-	-
FORM 2439, 8801, AND OTHER CREDIT TOTAL AMT:	\$0	\$0	\$0	\$0
TOTAL PAYMENTS:	\$10,848	\$10,056	\$17,748	\$7,839



2014 TAX YEAR SUMMARY



2018 TAX YEAR	2018
TAX RETURN FILED:	Original
WAGES, SALARIES, TIPS, ETC:	\$80,570
INTEREST INCOME OR LOSS (Sch B):	\$12
ORDINARY DIVIDEND INCOME (Sch B):	\$0
BUSINESS INCOME OR LOSS (Sch C):	\$45,695
CAPITAL GAIN OR LOSS: (Sch D):	(\$3,000)
RENT/ROYALTY/PARTNERSHIP/ESTATE (Sch E):	(\$13,362)
FARM INCOME OR LOSS (Sch F):	\$0
TOTAL INCOME:	\$109,915
TOTAL ADJUSTMENTS:	\$3,227
ADJUSTED GROSS INCOME:	\$106,688
STANDARD DEDUCTION:	\$11,900
ADDITIONAL STANDARD DEDUCTION:	\$0
TOTAL ITEMIZED DEDUCTIONS:	-
FORM 1040EZ DEDUCTION AND EXEMPTION :	-
TAX TABLE INCOME:	\$94,788
TOTAL CREDITS:	\$1,000
TOTAL TAX LIABILITY:	\$16,566
FEDERAL INCOME TAX WITHHELD:	\$10,048
TOTAL PAYMENTS:	\$10,048
REFUND AMOUNT:	-
AMOUNT OWED WHEN RETURN FILED:	\$6,609

SCHEDULE A SUMMARY

SCHEDULE A - ITEMIZED DEDUCTIONS	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
<b>MEDICAL/DENTAL</b>				
MEDICAL AND DENTAL EXPENSES:	\$0	\$0	\$0	\$0
AGI PERCENTAGE LIMITATION PER COMPUTER:	-	-	-	-
ADJUSTED GROSS INCOME PERCENTAGE PER COMPUTER 10 PERCENT:	-	\$0	\$0	\$0
ADJUSTED GROSS INCOME PERCENTAGE PER COMPUTER 7.5 PERCENT:	-	\$19,537	\$24,226	\$30,040
ADJUSTED GROSS INCOME PERCENTAGE PER COMPUTER 7.5 PERCENT:	-	\$14,652	\$18,168	\$22,529
NET MEDICAL DEDUCTION:	\$0	\$0	\$0	\$0
<b>TAXES PAID</b>				
STATE AND LOCAL INCOME TAXES:	\$4,196	\$14,077	\$17,455	\$21,645
INCOME TAX OR GENERAL SALES TAX:	Income Taxes	Income Taxes	-	-
REAL ESTATE TAXES:	\$3,566	\$3,731	\$4,626	\$5,737
NEW MOTOR VEHICLE TAXES:	\$0	-	-	-
OTHER TAXES AMOUNT:	\$0	\$2,011	\$2,494	\$3,092
SCH A TAX DEDUCTIONS:	\$7,762	\$19,819	\$24,576	\$30,474
<b>INTEREST PAID</b>				
MORTGAGE INTEREST (FINANCIAL):	\$17,905	\$85,042	\$105,452	\$130,761
MORTGAGE INTEREST (INDIVIDUAL):	\$0	\$0	\$0	\$0
DEDUCTIBLE POINTS:	\$0	\$0	\$0	\$0
QUALIFIED MORTGAGE INSURANCE PREMIUMS:	\$0	\$0	\$0	\$0
DEDUCTIBLE INVESTMENT INTEREST:	\$0	\$0	\$0	\$0
TOTAL INTEREST DEDUCTION:	\$17,905	\$85,042	\$105,452	\$130,761
<b>CHARITABLE CONTRIBUTIONS</b>				
CASH CONTRIBUTIONS:	\$800	\$200	\$248	\$308
OTHER THAN CASH: Form 8283:	\$0	\$0	\$0	\$0
CARRYOVER FROM PRIOR YEAR:	\$0	\$0	\$0	\$0
SCH A TOTAL CONTRIBUTIONS:	\$800	\$200	\$248	\$308
<b>CASUALTY AND THEFT LOSS</b>				
CASUALTY OR THEFT LOSS:	\$0	\$0	\$0	\$0
<b>JOBS AND MISCELLANEOUS</b>				
UNREIMBURSED EMPLOYEE EXPENSE AMOUNT:	\$0	\$0	\$0	\$0
TOTAL LIMITED MISC EXPENSES:	\$0	\$0	\$0	\$0
NET LIMITED MISC DEDUCTION:	\$0	\$0	\$0	\$0
<b>OTHER MISCELLANEOUS</b>				
OTHER THAN GAMBLING AMOUNT:	\$0	\$0	\$0	\$0
OTHER MISC DEDUCTIONS:	\$0	\$0	\$0	\$0
<b>TOTAL ITEMIZED DEDUCTIONS</b>				
TOTAL ITEMIZED DEDUCTIONS:	\$26,467	\$105,061	\$130,276	\$161,542
ELECT ITEMIZED DEDUCTION INDICATOR:	0	0	0	0
SCH A ITEMIZED PERCENTAGE PER COMPUTER:	0	0	0	0

SCHEDULE B SUMMARY

INTEREST AND DIVIDENDS	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
GROSS SCHEDULE B INTEREST:	\$8,645	\$9,164	\$9,714	\$10,296
TAXABLE INTEREST INCOME:	\$6,142	\$6,511	\$6,901	\$7,315
EXCLUDABLE SAVINGS FROM BOND INT:	\$0	\$0	\$0	\$0
GROSS SCHEDULE B DIVIDENDS:	\$12	\$13	\$456	\$29
DIVIDEND INCOME:	\$0	\$0	\$0	\$0
FOREIGN ACCOUNTS IND:	None	None	None	None
FOREIGN COUNTRY FINANCIAL INTEREST/SIGNATURE AUTHORITY:	None	None	None	None

SCHEDULE C SUMMARY

SCHEDULE C - PROFIT OR LOSS FROM BUSINESS	2015	2016	2017	2018
TAX RETURN FILED:		No	No	Original
<b>SCHEDULE C - GENERAL INFORMATION</b>				
NUMBER OF SCHEDULE C's ON RETURN:	3	1	1	1
SOCIAL SECURITY NUMBER:	***-9-9999	***-9-9999	***-9-9999	***-9-9999
EMPLOYER ID NUMBER:	88-8888888	88-8888888	88-8888888	88-8888888
BUSINESS NAME:	North Pole Toy Company	North Pole Toy Company	North Pole Toy Company	North Pole Toy Company
DESCRIPTION OF BUSINESS/PROFESSION:	Manufacturing	Manufacturing	Manufacturing	Manufacturing
NAICS CODE:	123456	123456	123456	123456
ACCT MTHD:	Cash	Cash	Cash	Cash
FIRST TIME SCHEDULE C FILED:	YES	N	N	N
STATUTORY EMPLOYEE IND:	N	N	N	N
<b>INCOME</b>				
GROSS MERCHANT CARD AND THIRD PARTY NETWORK RECEIPTS AND SALES:	\$99,483	\$1,234,600	\$743,326	\$1,238,640
GROSS RECEIPTS OR SALES (NON-MERCHANT-CARD AND NON-THIRD-PARTY):	-	-	-	-
INCOME REPORTED TO YOU ON FORM W-2:	-	-	-	-
TOTAL GROSS RECEIPTS:	-	-	-	-
GROSS RECEIPTS OR SALES:	\$154,273	\$154,273	\$154,273	\$154,273
RETURNS AND ALLOWANCES:	\$0	\$0	\$0	\$0
NET GROSS RECEIPTS:	\$154,273	\$154,273	\$154,273	\$154,273
COST OF GOODS SOLD:	\$0	\$0	\$0	\$0
SCHEDULE C FORM 1099 REQUIRED:	YES	YES	YES	YES
SCHEDULE C FORM 1099 FILED:	YES	YES	YES	YES
OTHER INCOME:	-	-	-	-
<b>EXPENSES</b>				
CAR AND TRUCK EXPENSES:	\$20,402	\$28,359	\$39,419	\$54,792
DEPRECIATION:	\$0	\$0	\$0	\$0
INSURANCE (OTHER THAN HEALTH):	\$1,486	\$2,066	\$2,871	\$3,991
MORTGAGE INTEREST:	-	-	-	-
LEGAL AND PROFESSIONAL SERVICES:	\$2,182	\$3,033	\$4,216	\$5,860
REPAIRS AND MAINTENANCE:	\$11,658	\$16,205	\$22,524	\$31,309
TRAVEL:	\$4,057	\$5,639	\$7,839	\$10,896
MEALS AND ENTERTAINMENT:	\$2,628	\$3,653	\$5,078	\$7,058
WAGES:	\$0	\$0	\$0	\$0
OTHER EXPENSES:	\$26,899	\$37,390	\$51,972	\$72,240
TOTAL EXPENSES:	\$61,702	\$85,766	\$119,214	\$165,708
EXP FOR BUSINESS USE OF HOME:	\$2,769	\$3,849	\$5,350	\$7,436
SCH C NET PROFIT OR LOSS PER COMPUTER:	\$89,802	\$124,825	\$173,506	\$241,174
AT RISK CD:	0	0	0	0
OFFICE EXPENSE AMOUNT:	\$6,927	\$9,629	\$13,384	\$18,603
UTILITIES EXPENSE AMOUNT:	\$4,423	\$6,148	\$8,546	\$11,878

SCHEDULE C SUMMARY

SCHEDULE C - Cont'd	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
COST OF GOODS SOLD				
INVENTORY AT BEGINNING OF YEAR:	\$0	-	-	-
INVENTORY AT END OF YEAR:	\$0	-	-	-
SCHEDULE SE - SELF EMPLOYMENT TAX				
SSN OF SELF-EMPLOYED TAXPAYER:	***-9-999	***-9-1000	***-9-1001	-
NET FARM PROFIT/LOSS: SCH F:	\$0	\$0	\$0	\$0
CONSERVATION RESERVE PROGRAM PAYMENTS::	\$0	\$0	\$0	\$0
NET NONFARM PROFIT/LOSS:	\$45,695	\$61,688	\$83,279	\$112,427
TOTAL SE INCOME:	\$45,695	\$61,688	\$83,279	\$112,427
SE QUARTERS COVERED:	4	5.4	7.29	9.8415
TOTAL SE TAX PER COMPUTER:	\$5,612	\$7,577	\$10,229	\$13,809
SE INCOME PER COMPUTER:	\$42,199	\$56,969	\$76,908	\$103,825
TOTAL NET EARNINGS PER COMPUTER:	\$42,199	\$56,969	\$76,908	\$103,825
LONG FORM ONLY				
TENTATIVE CHURCH EARNINGS:	\$0	\$0	\$0	\$0
TOTAL SOC SEC & RR WAGES:	\$0	\$0	\$0	\$0
SE SS TAX COMPUTER:	\$4,389	\$5,925	\$7,998	\$10,798
SE MEDICARE INCOME PER COMPUTER:	\$42,199	\$56,969	\$76,908	\$103,825
SE MEDICARE TAX PER COMPUTER:	\$1,224	\$1,652	\$2,230	\$3,011
SE FARM OPTION METHOD USED:	0	0	0	0
SE OPTIONAL METHOD INCOME:	0	0	0	0

SCHEDULE D SUMMARY

SCHEDULE D - CAPITAL GAINS AND LOSSES	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
<b>SHORT TERM CAPITAL GAINS AND LOSSES</b>				
TOTAL SHORT TERM-SALES PRICE:	-	-	-	-
SHORT TERM BASIS NO ADJUSTMENTS SALE AMOUNT:	-	-	-	-
SHORT TERM BASIS NO ADJUSTMENTS COST AMOUNT:	-	-	-	-
SHORT TERM BASIS SALE AMOUNT:	\$1,582	\$2,041	\$2,633	\$3,396
SHORT TERM BASIS COST AMOUNT:	\$2,698	\$3,480	\$4,490	\$5,792
SHORT TERM BASIS ADJUSTMENTS:	-	-	-	-
SHORT TERM NO BASIS SALE AMOUNT:	\$0	\$0	\$0	\$0
SHORT TERM NO BASIS COST AMOUNT:	-	-	-	-
SHORT TERM NO BASIS ADJUSTMENTS:	-	-	-	-
SHORT TERM NO 1099B SALE AMOUNT:	\$0	\$0	\$0	\$0
SHORT TERM NO 1099B COST AMOUNT:	-	-	-	-
SHORT TERM NO 1099B ADJUSTMENTS:	-	-	-	-
SHORT TERM SCHEDULE K-1 AMOUNT:	-	-	-	-
NET SHORT-TERM GAIN/LOSS:	\$3,201	\$4,129	\$5,327	\$6,872
<b>LONG TERM CAPITAL GAINS AND LOSSES</b>				
TOTAL LONG-TERM SALES PRICE:	-	-	-	-
LONG TERM BASIS NO ADJUSTMENTS SALE AMOUNT:	-	-	-	-
LONG TERM BASIS NO ADJUSTMENTS COST AMOUNT:	-	-	-	-
LONG TERM BASIS SALE AMOUNT:	\$5,987	\$7,723	\$9,963	\$12,852
LONG TERM BASIS COST AMOUNT:	\$4,839	\$6,242	\$8,053	\$10,388
LONG TERM BASIS ADJUSTMENTS:	-	-	-	-
LONG TERM NO BASIS SALE AMOUNT:	\$0	\$0	\$0	\$0
LONG TERM NO BASIS COST AMOUNT:	-	-	-	-
LONG TERM NO BASIS ADJUSTMENTS:	-	-	-	-
LONG TERM NO 1099B SALE AMOUNT:	-	-	-	-
LONG TERM NO 1099B COST AMOUNT:	-	-	-	-
LONG TERM NO 1099B ADJUSTMENTS:	-	-	-	-
LONG TERM SCHEDULE K-1 AMOUNT:	-	-	-	-
CAPITAL GAIN DISTRIBUTIONS (PR):	\$0	\$0	\$0	\$0
NET LONG-TERM GAIN/LOSS:	(\$3,315)	(\$4,276)	(\$5,516)	(\$7,116)
<b>TAX COMPUTATION USING MAXIMUM CAPITAL GAINS RATES</b>				
28% RATE GAIN:	\$0	\$0	\$0	\$0
UNRECAPTURED SECT: 1250 GAIN:	\$4,298	\$5,544	\$7,152	\$9,226
SCH D 15% TAX CMPTR:	\$0	\$0	\$0	\$0
CAPITAL GAINS LESS INVEST INCOME PER COMPUTER:	\$0	\$0	\$0	\$0
CAP GAINS TENTATIVE AMT PER COMPUTER (1):	\$0	\$0	\$0	\$0
CAP GAINS TAX AMT PER COMPUTER (1):	\$685	\$884	\$1,140	\$1,470
CAP GAINS TENTATIVE AMT PER COMPUTER (2):	\$0	\$0	\$0	\$0
CAP GAINS TAX AMT PER COMPUTER (5):	\$129,564	\$167,138	\$215,607	\$278,134
CAP GAINS TAX AMT PER COMPUTER (6):	\$0	\$0	\$0	\$0
SCHEDULE D TAX PER COMPUTER:	\$12,356	\$15,939	\$20,562	\$26,524

SCHEDULE E SUMMARY

SCHEDULE E - SUPPLEMENTAL INCOME AND LOSS	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
<b>INCOME OR LOSS FROM RENTAL REAL ESTATE AND ROYALTIES</b>				
PRSNL USE OF RENTAL VAC PROP:	-	-	-	-
SCHEDULE E FORM 1099 REQUIRED:	No box checked	No box checked	No box checked	No box checked
SCHEDULE E FORM 1099 FILED:	Neither box checked	Neither box checked	Neither box checked	Neither box checked
TOTAL RENTS RECEIVED:	\$8,450	\$14,365	\$24,421	\$41,515
TOTAL ROYALTIES RECEIVED:	\$568	\$966	\$1,642	\$2,791
MORTGAGE INTEREST PAID:	-	-	-	-
TOTAL RENTAL EXPENSE DEDUCTION:	-	-	-	-
RENTAL DEPRECIATION EXP OR	-	-	-	-
MERCHANT CARD PAYMENTS:	-	-	-	-
MERCHANT CARD ROYALTIES:	-	-	-	-
TOTAL MORTGAGE INTEREST ALL PROPERTIES:	\$527	\$896	\$1,523	\$2,589
TOTAL DEPRECIATION OR DEPLETION FOR ALL PROPERTIES:	\$3,394	\$5,770	\$9,809	\$16,675
TOTAL EXPENSES FOR ALL PROPERTIES:	\$14,390	\$24,463	\$41,587	\$70,698
TOTAL RENTAL REAL ESTATE AND ROYALTY INCOME OR LOSS:	\$0	\$0	\$0	\$0
RENT & ROYALTY INCOME:	\$0	\$0	\$0	\$0
RENT & ROYALTY LOSSES:	\$13,362	\$22,715	\$38,616	\$65,648
REPAIRS EXPENSE COLUMN A:	\$1,712	\$2,910	\$4,948	\$8,411
REPAIRS EXPENSE COLUMN B:	\$0	\$0	\$0	\$0
REPAIRS EXPENSE COLUMN C:	\$0	\$0	\$0	\$0
<b>INCOME OR LOSS FROM PARTNERSHIPS AND S CORPS</b>				
PRTSHP/CORP PASSIVE INCOME:	\$546	\$928	\$1,578	\$2,682
PRTSHP/CORP NONPASSIVE INCOME:	\$0	\$0	\$0	\$0
PRTSHP/CORP PASSIVE LOSS:	\$0	\$0	\$0	\$0
PRTSHP/CORP NONPASSIVE LOSS:	\$6,548	\$11,132	\$18,924	\$32,170
PARTNERSHIP INCOME:	\$0	\$0	\$0	\$0
PARTNERSHIP LOSS:	\$0	\$0	\$0	\$0
<b>INCOME OR LOSS FROM ESTATES AND TRUSTS</b>				
ESTATE/TRUST PASSIVE INCOME:	\$0	\$0	\$0	\$0
ESTATE/TRUST PASSIVE LOSS:	\$6,548	\$11,132	\$18,924	\$32,170
ESTATE AND TRUST INCOME:	\$0	\$0	\$0	\$0
ESTATE AND TRUST LOSS:	\$0	\$0	\$0	\$0
PASSIVE LOSS NOT REPORTED ON F8582:	N	N	N	N
SCH K1 ES PAYMENT INDICATOR:	N	N	N	N
<b>INCOME OR LOSS FROM REAL ESTATE MORTGAGE INVESTMENT CONDUITS</b>				
REAL ESTATE MORTGAGE INCOME/LOSS:	\$44,687	\$75,968	\$129,145	\$219,547
<b>SUMMARY</b>				
NET FARM RENT INCOME/LOSS:	\$1,245	\$2,117	\$3,598	\$6,117
GROSS FARMING & FISHING INCOME:	\$0	\$0	\$0	\$0
<b>FORM 6198 - AT RISK LIMITATIONS</b>				
CURRENT YEAR OVERALL PROFIT/LOSS:	\$875	\$1,488	\$2,529	\$4,299
AT RISK AMOUNT:	\$875	\$1,488	\$2,529	\$4,299
DEDUCTIBLE LOSS:	\$752	\$1,278	\$2,173	\$3,695

SCHEDULE F SUMMARY

SUMMARY	2015	2016	2017	2018
TAX RETURN FILED:	Original	Original	Original	Original
<b>FARM INCOME - CASH METHOD</b>				
NAICS CODE:	-	-	-	-
EIN:	0	0	0	0
SCHEDULE F FORM 1099 REQUIRED:	Neither box checked	Yes box checked	Yes box checked	Yes box checked
SCHEDULE F FORM 1099 FILED:	Neither box checked	Yes box checked	Yes box checked	Yes box checked
COST OR OTHER BASIS OF LIVESTOCK:	\$0	\$0	-	-
TOTAL COOPERATIVE DISTRIBUTIONS FORM 1099-PATR:	\$0	\$0	\$0	\$0
TOTAL AGRICULTURAL PROGRAMS PAYMENTS:	\$0	\$0	\$0	\$0
AGRICULTURAL PAYMENTS TAXABLE AMOUNT:	\$0	\$0	\$0	\$0
GROSS CCC LOANS FORFEITED/REPAID:	\$0	\$0	\$0	\$0
GROSS CROP INSURANCE/DISASTER TAXBLE CROP INSURANCE/DISASTER PAYMENTS:	\$0	\$0	\$0	\$0
SPECIFIED CUSTOM HIRE (MACHINE WORK) INCOME:	\$0	\$0	\$0	\$0
SALES OF RAISED PRODUCTS:	\$0	\$0	\$0	\$0
TAXABLE COOPERATIVE DISTRIBUTION:	-	-	-	-
GROSS FARM INCOME-CASH:	\$1,680	\$3,360	\$4,066	\$4,919
<b>FARM EXPENSES - CASH AND ACCRUAL METHOD</b>				
CUSTOM HIRE - MACHINE WORK:	\$3,580	\$1,350	\$1,634	\$1,977
GASOLINE, FUEL, OIL DEDUCTION:	\$2,778	\$3,472	\$4,201	\$5,083
MORTGAGE INTEREST:	-	-	-	-
REPAIRS & MAINTENANCE:	\$2,028	\$5,740	\$6,945	\$8,404
SUPPLIES PURCHASED:	\$4,909	\$0	\$0	\$0
TOTAL FARM EXPENSES:	\$60,378	\$69,401	\$83,975	\$101,610
NET FARM PROFIT/LOSS PER COMPUTER:	(\$58,698)	(\$66,041)	(\$79,910)	(\$96,691)
AMOUNTS NOT AT RISK IN FARM INDICATOR:	All investment at risk	All investment at risk	-	-
<b>FARM INCOME - ACCRUAL METHOD</b>				
TOTAL COOPERATIVE DISTRIBUTIONS:	\$0	\$0	\$0	\$0
TAXABLE COOPERATIVE DISTRIBUTION:	-	-	-	-
AGRICULTURAL PROGRAM PAYMENTS:	\$0	\$0	\$0	\$0
CCC LOANS FORFEITED OR REPAID:	\$0	\$0	\$0	\$0
TOTAL FARM INCOME-ACCRUAL:	\$0	\$0	\$0	\$0
GROSS FARM INCOME-ACCRUAL:	\$0	\$0	\$0	\$0