

Intake Notes	<p>Taxpayer Income Trend? = Same Is Taxpayer in resolution? = No Current resolution monthly payment? = 433 prepared? = No MDI amount? = Taxpayer maximum monthly payment? = Taxpayer target monthly payment? = Unresolved state tax debt? = No Which states? = State debt amount owed? = RO or RA Assigned? = No Taxpayer home value? = Tax pro notes: Need to remove two liens (2014 & 2015)</p>
Compliance	YES
Audit or Exam?	NO
Appeal Deadlines?	NO
Collections Statute Expiration Dates (CSED)	<p>2014 – 8/25/2025 2015 – 6/7/2026 2016 – 6/6/2027 2017 – 6/14/2032 2018 – 8/18/2030 2019 – 11/24/2030</p>
First Time Abatement (FTA) Opportunity	2014
Collections Status	<p>NOT in Collections – Assigned to a Private Collection Agency (PCA). The Private Collection Agencies (PCA) contracted by the IRS have limited authority. They can only enter into 72 month repayment agreements and have no authority to levy. The current companies contracted by the IRS are CBE, Conserve, and Coast Professional, Inc (as of September 23, 2021) . Notice CP40 issued by the IRS will contain details on assigned PDC and taxpayer authentication number which will be needed to speak with the PCA. If taxpayer does not have this notice then you can call the Practitioner Priority Line (PPL) to obtain.</p>
Estimated Installment Agreement (IA) Amount	Streamline Installment Agreement - Approximately \$225, Within CSEDs – Approximately \$150
Collectability Opinion	HIGH – balance due relatively low and taxpayer appears to have decent income
Criminal Evaluation	LOW – balance due under \$25k
Summary & Strategy	<p>Looks like taxpayer made payments on 2014 & 2015 but there are remaining balances resulting in the lien still being in effect. The quickest way to resolve is to setup an Installment Agreement (needs to be streamline to prevent additional liens being filed) and requesting First Time Abatement (FTA). Looks like there are sufficient penalties eligible for abatement to eliminate 2014 and (hopefully) enough overpayments to pay off 2015. Once the 2014 & 2015 balances are extinguished the lien release is generally sent out within 30 days.</p> <p>Step 1. Obtain client consent to IA of approximately \$225. Step 2. Determine PCA taxpayer is assigned to and send written request that the balance dues be sent back to Automated Collections System (ACS).</p>



TAX MENTOR

	<p>Step 3. Call ACS and establish the Installment Agreement, on the same call request FTA on 2014 tax period. Monitor the transcript for FTA processing and how much overpayment is applied to 2015.</p> <p>Step 4. If any remaining balance on 2015 after the application of 2014 over payments, have client payoff ASAP to extinguish the lien.</p> <p>Step 5. Monitor for lien release being sent to the taxpayer, generally 30 days after the debt is satisfied in full.</p>
--	--

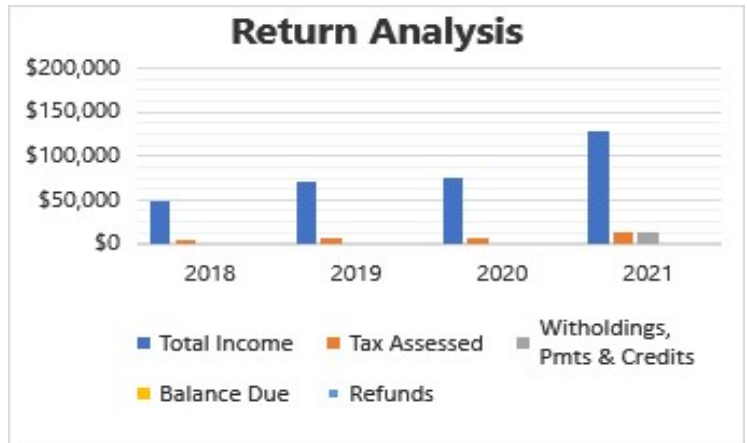
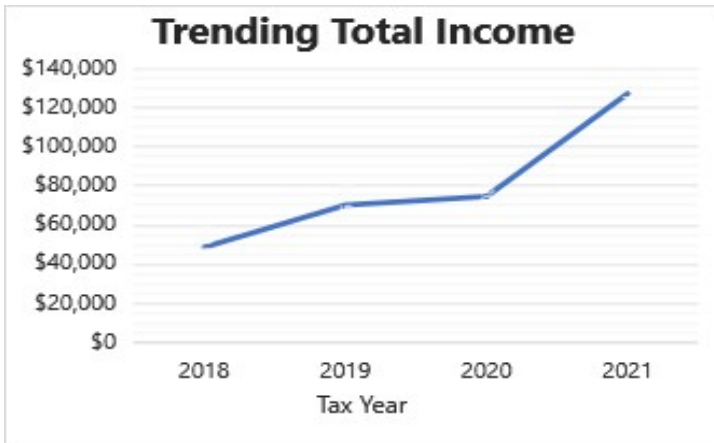
DISCLAIMER:

Tax Mentor Group, LLC dba tax Mentor (TMG) is not a law firm and does not provide legal advice. No attorney client relationship is created by use of these materials. TMG is not an accounting firm and the materials provided should not be taken as tax, accounting or financial planning advice.

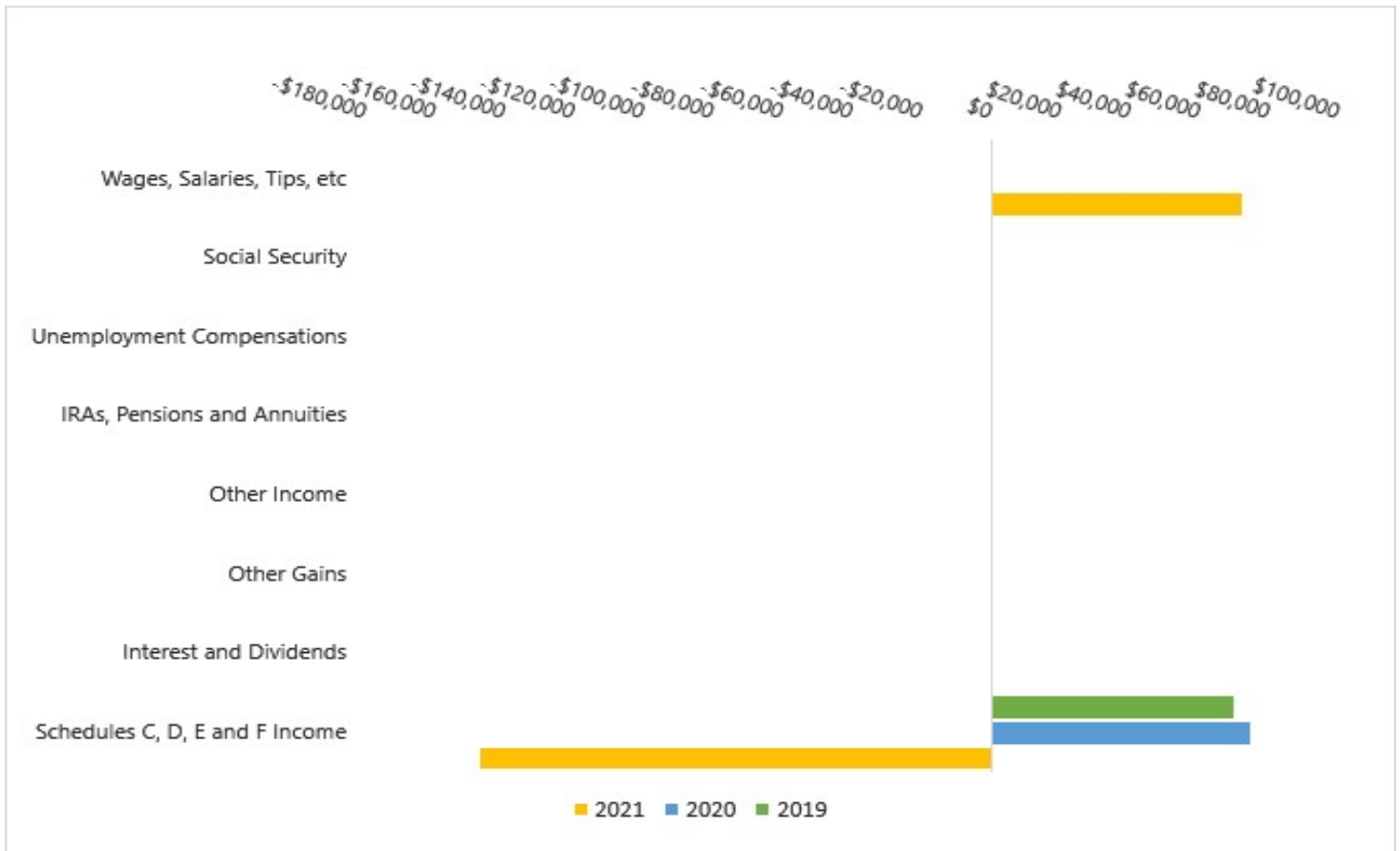
These materials are provided "AS-IS," TMG does not give any express or implied warranties of merchantability, suitability, or completeness for your particular needs. The materials are used at your own risk and TMG takes no responsibility for errors or omissions. In no event will TMG, its employees, or affiliates be responsible or liable for any direct, indirect, incidental, special, exemplary or consequential damages arising from use of the provided materials.

TMG has created the materials on a "best efforts basis" and the user is responsible for taking all necessary steps to ensure that the information received is correct and suitable before undertaking any actions. In no way should TMG providing these materials be seen as a substitute for user's existing professional obligations. Including, but not limited to; Circular 230, state & national professional organizations, and requirements under insurance.

Taxpayer IRS Account Analysis



Income Breakdown



Income Breakdown	2019	2020	2021
Wage & Income Transcript Date	6/20/2022	6/20/2022	6/20/2022
Wages, Salaries, Tips, etc	\$0	\$0	\$72,000
Social Security	\$0	\$0	\$0
Unemployment Compensations	\$0	\$0	\$0
IRAs, Pensions and Annuities	\$0	\$0	\$0
Other Income	\$0	\$0	\$0
Other Gains	\$0	\$0	\$0
Interest and Dividends	\$0	\$0	\$0
Schedules C, D, E and F Income	\$69,960	\$74,373	(\$146,869)

IRS ACCOUNT STATUS DASHBOARD

Year	Return Filed	Filing Status	Extension Date	Lien Active	Collections Active	Examination Active	Assessed Balance	Accrued Balance	Transcript Date
2022	-	Uk					-	-	not found
2021	Original	MFJ	10/15/2022				\$0.00	\$0.00	8/4/2022
2020	Original	MFS	10/15/2021				\$0.00	\$0.00	8/4/2022
2019	Original	MFS	10/15/2020				\$0.00	\$283.25	8/4/2022
2018	Original	MFS	10/15/2019		No		\$0.28	\$261.30	8/4/2022
2017	Original	MFS	10/15/2018		No		\$10,036.52	\$10,118.79	8/4/2022
2016	Amended	MFS			No		\$0.37	\$1,777.45	8/4/2022
2015	Original	MFS		12/9/2016	No		\$0.25	\$279.26	8/4/2022
2014	Original	S		12/9/2016			\$0.00	\$1,012.70	8/4/2022
2013	No	S					\$0.00	\$0.00	8/4/2022
2012	No	S					\$0.00	\$0.00	8/4/2022
2011	No	S					\$0.00	\$0.00	8/4/2022
2010	No	S					\$0.00	\$0.00	8/4/2022
						Total	\$10,037.42	\$13,732.75	

*Indicates an SFR was originally filed.

**Only positive numbers are included in the total.

***SA P = Separate Assessment without split liability is present but totals are not included in this report.

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

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

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

= Indicates exam/audit is CP2000/AUR

WAGE INCOME SUMMARY

Definitions	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Totals
Transcript Date:	6/20/2022	6/20/2022	6/20/2022	6/20/2022	6/20/2022	6/20/2022	6/20/2022	6/20/2022	6/20/2022	6/20/2022	
Ordinary Income K-1:	-	-	\$41,639	\$16,374	\$31,908	\$50,655	\$48,347	\$69,960	\$74,373	(\$146,869)	\$186,387
Medicare Wages:	-	-	-	-	-	-	-	-	-	\$72,000	\$72,000
Taxable FICA Wages:	-	-	-	-	-	-	-	-	-	\$72,000	\$72,000
Wages:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$72,000	\$72,000
Non-employee Compensation:	-	\$3,750	\$3,000	\$635	\$6,662	\$0	\$0	\$0	-	-	\$14,047
Federal Tax Withheld:	-	\$0	\$108	\$0	\$0	\$0	\$0	\$0	\$0	\$6,150	\$6,258
FICA Tax Withheld:	-	-	-	-	-	-	-	-	-	\$4,464	\$4,464
Amount of Debt Discharged:	-	\$3,047	-	-	-	-	-	-	-	-	\$3,047
Medicare Withheld:	-	-	-	-	-	-	-	-	-	\$1,044	\$1,044
Gross Winnings:	-	-	-	-	\$1,000	-	-	-	-	-	\$1,000
Gross Distributions:	-	\$0	\$544	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$544
Taxable Amount:	-	\$0	\$544	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$544
Interest:	-	\$0	\$34	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$34
Allocated Tips:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Capital Gains:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Dividends:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
IRA Contributions:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Mortgage Interest Paid:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Nonemployee Compensation :	-	-	-	-	-	-	-	-	\$0	\$0	\$0
Pensions and Annuities:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Points Paid:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prior Year Refund:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Real Estate Sales:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Savings Bonds:	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

*Summary Transcripts should not be used to create tax returns or amended returns due to their inaccuracies. Use the All Forms Wage and Income Transcripts.

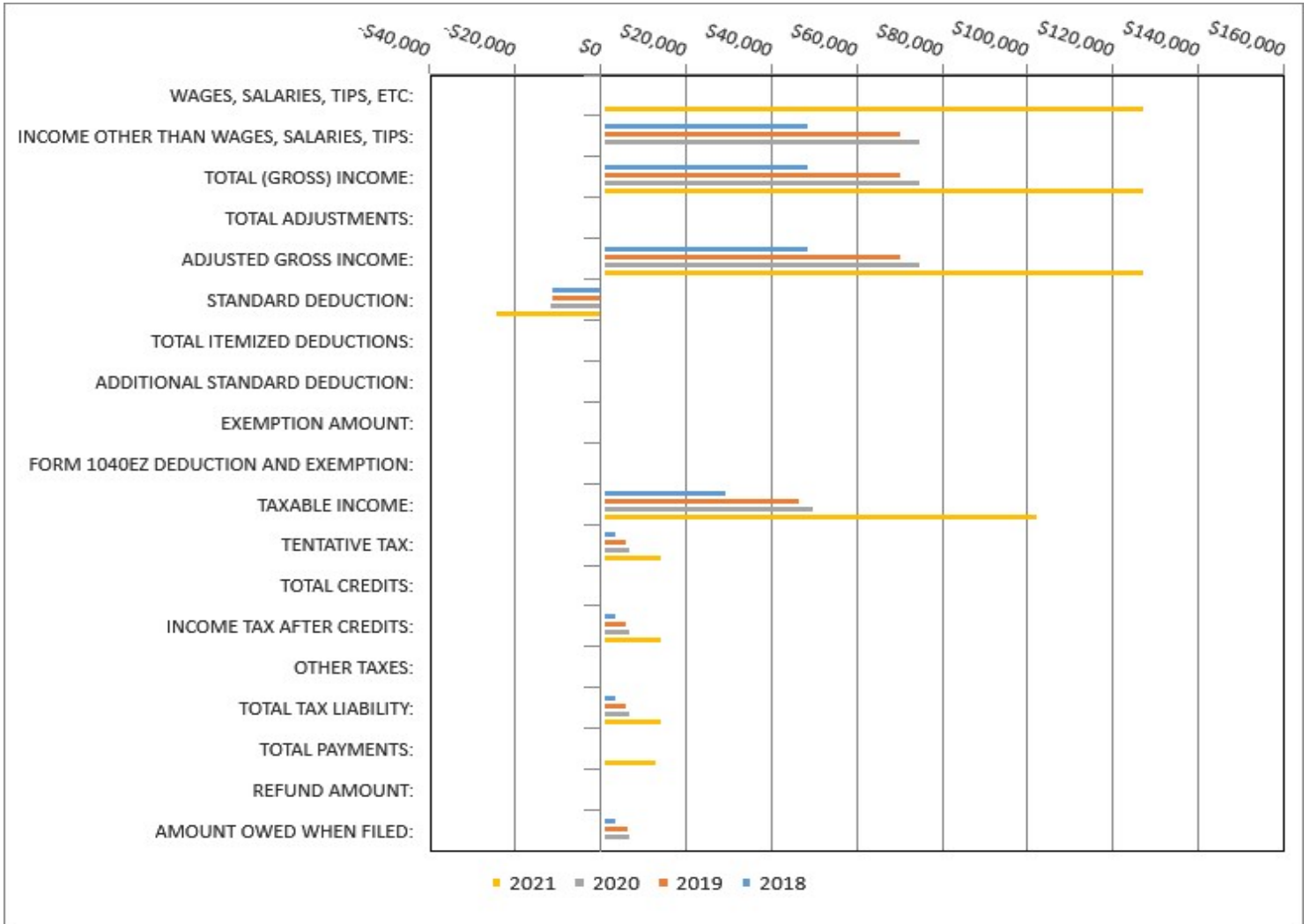
INCOME DOCUMENTS

Transcript Date:	2012 6/20/2022	2013 6/20/2022	2014 6/20/2022	2015 6/20/2022	2016 6/20/2022	2017 6/20/2022	2018 6/20/2022	2019 6/20/2022	2020 6/20/2022	2021 6/20/2022	Totals
W-2	0	0	0	0	0	0	0	0	0	1	1
1098	0	0	0	0	0	0	0	0	0	0	0
1098-C	0	0	0	0	0	0	0	0	0	0	0
1098-E	0	0	0	0	0	0	0	0	0	0	0
1098-T	0	0	0	0	0	0	0	0	0	0	0
5498	0	0	0	0	0	0	0	0	0	0	0
5498 SA	0	0	0	0	0	0	0	0	0	0	0
1099-A	0	0	0	0	0	0	0	0	0	0	0
1099-B	0	0	0	0	0	0	0	0	0	0	0
1099-C	0	1	0	0	0	0	0	0	0	0	1
1099-CAP	0	0	0	0	0	0	0	0	0	0	0
1099-DIV	0	0	0	0	0	0	0	0	0	0	0
1099-G	0	0	0	0	0	0	0	0	0	0	0
1099-H	0	0	0	0	0	0	0	0	0	0	0
1099-INT	0	0	0	0	0	0	0	0	0	0	0
1099-K	0	0	0	0	0	0	0	0	0	0	0
1099-LTC	0	0	0	0	0	0	0	0	0	0	0
1099-MISC	0	1	1	1	1	0	0	0	0	0	4
1099-OID	0	0	0	0	0	0	0	0	0	0	0
1099-PATR	0	0	0	0	0	0	0	0	0	0	0
1099-Q	0	0	0	0	0	0	0	0	0	0	0
1099-R	0	0	1	0	0	0	0	0	0	0	1
1099-S	0	0	0	0	0	0	0	0	0	0	0
1099-SA	0	0	0	0	0	0	0	0	0	0	0
1042-S	0	0	0	0	0	0	0	0	0	0	0
SSA-1099	0	0	0	0	0	0	0	0	0	0	0
SSA-1042S	0	0	0	0	0	0	0	0	0	0	0
RRB-1099	0	0	0	0	0	0	0	0	0	0	0
RRB-1099R	0	0	0	0	0	0	0	0	0	0	0
RRB-1042S	0	0	0	0	0	0	0	0	0	0	0
W-2G	0	0	0	0	1	0	0	0	0	0	1
K-1 1041	0	0	0	0	0	0	0	0	0	0	0
K-1 1065	0	0	0	0	0	0	0	0	0	0	0
K-1 1120s	0	0	1	1	1	1	1	1	1	1	8
W-4	0	0	0	0	0	0	0	0	0	0	0
3921	0	0	0	0	0	0	0	0	0	0	0
3922	0	0	0	0	0	0	0	0	0	0	0
8805	0	0	0	0	0	0	0	0	0	0	0

INCOME DOCUMENTS (cont.)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Totals
	12/31/1899	12/31/1899	12/31/1899	12/31/1899	12/31/1899	12/31/1899	12/31/1899	12/31/1899	12/31/1899	12/31/1899	
1097-BTC											
1098-Q	0	0	0	0	0	0	0	0	0	0	0
1099-LS	0	0	0	0	0	0	0	0	0	0	0
1099-MSA	0	0	0	0	0	0	0	0	0	0	0
1099-SB	0	0	0	0	0	0	0	0	0	0	0
5498-ESA	0	0	0	0	0	0	0	0	0	0	0
5498-MSA	0	0	0	0	0	0	0	0	0	0	0
1099-NEC	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	2	3	2	3	1	1	1	1	2	16

TAX RETURN OVERVIEW



TAX SUMMARY	2018	2019	2020	2021
RETURN TRANSCRIPT DATE	8/4/2022	8/4/2022	8/4/2022	8/4/2022
TAX RETURN FILED:	Original	Original	Original	Original
TYPE OF RETURN:	1040	1040	1040	1040
WAGES, SALARIES, TIPS, ETC:	\$0	\$0	\$0	\$126,798
INCOME OTHER THAN WAGES, SALARIES, TIPS:	\$48,347	\$69,960	\$74,373	\$183
TOTAL (GROSS) INCOME:	\$48,347	\$69,960	\$74,373	\$126,981
TOTAL ADJUSTMENTS:	\$0	\$0	\$0	\$0
ADJUSTED GROSS INCOME:	\$48,347	\$69,960	\$74,373	\$126,981
STANDARD DEDUCTION:	(\$12,000)	(\$12,200)	(\$12,400)	(\$25,100)
TOTAL ITEMIZED DEDUCTIONS:	-	-	-	-
ADDITIONAL STANDARD DEDUCTION:	\$0	\$0	\$0	\$0
EXEMPTION AMOUNT:	\$0	\$0	\$0	\$0
FORM 1040EZ DEDUCTION AND EXEMPTION:	-	-	-	-
TAXABLE INCOME:	\$29,078	\$46,208	\$49,578	\$101,881
TENTATIVE TAX:	\$3,299	\$6,028	\$6,697	\$13,911
TOTAL CREDITS:	\$0	\$0	\$0	\$0
INCOME TAX AFTER CREDITS:	\$3,299	\$6,028	\$6,697	\$13,911
OTHER TAXES:	\$0	\$0	\$0	\$0
TOTAL TAX LIABILITY:	\$3,299	\$6,028	\$6,697	\$13,911
TOTAL PAYMENTS:	\$0	\$0	\$0	\$13,003
REFUND AMOUNT:	-	-	-	-
AMOUNT OWED WHEN FILED:	\$3,406	\$6,140	\$6,802	\$908

CSED CALCULATIONS AND IA PAYMENTS

Year	Code	Assessment	Date	Original Assessed Amount	Remaining Balance	Estimated Total Tolling Days	Estimated THS Calculated CSED	IRS CSED	CSED Days Variation	Months Until CSED	Estimated IA Payments CSED (Including Daily Accrued Interest)**	Estimated IA Payments 72 Mths (Including Daily Accrued Interest)**	Estimated IA Payments 84 Mths (Including Daily Accrued Interest)**
2021	150	Tax return filed	4/4/2022	\$13,911.00	\$0.00		4/5/2032	uk		-	\$0.00		
		2021 Reversed Credits/Other			\$0.00		4/5/2032			0			
		2021 Accrued Penalty			\$0.00		4/5/2032			0			
		2021 Accrued Interest			\$0.00		4/5/2032			0			
		2021 Total IA Payments									\$0.00		
2020	150	Tax return filed	5/17/2021	\$6,697.00	\$0.00		5/18/2031	5/17/2031		0-	\$0.00		
	170	Penalty for not pre-paying tax	5/17/2021	\$105.00	\$0.00		5/18/2031	5/17/2031		0-	\$0.00		
		2020 Reversed Credits/Other			\$0.00		5/18/2031			0			
		2020 Accrued Penalty			\$0.00		5/18/2031			0			
		2020 Accrued Interest			\$0.00		5/18/2031			0			
		2020 Total IA Payments									\$0.00		
2019	150	Tax return filed	11/23/2020	\$6,028.00	\$0.00		11/24/2030	11/23/2030		0-	\$0.00		
	276	Penalty for late payment of tax	11/23/2020	\$150.70	\$0.00		11/24/2030	11/23/2030		0-	\$0.00		
	170	Penalty for not pre-paying tax	11/23/2020	\$112.00	\$0.00		11/24/2030	11/23/2030		0-	\$0.00		
	196	Interest charged for late payment	11/23/2020	\$65.07	\$0.00		11/24/2030	11/23/2030		0-	\$0.00		
	276	Penalty for late payment of tax	6/21/2021	\$0.23	\$0.00		11/24/2030	uk		-	\$0.00		
		2019 Reversed Credits/Other			\$0.00		11/24/2030			0			
		2019 Accrued Penalty			\$180.61		11/24/2030			0			
		2019 Accrued Interest			\$102.64		11/24/2030			0			
		2019 Total IA Payments									\$0.00		
2018	150	Tax return filed	8/17/2020	\$3,299.00	\$0.00		8/18/2030	8/17/2030		0-	\$0.00		
	276	Penalty for late payment of tax	8/17/2020	\$280.41	\$0.00		8/18/2030	8/17/2030		0-	\$0.00		
	166	Penalty for filing tax return after the	8/17/2020	\$742.27	\$0.00		8/18/2030	8/17/2030		0-	\$0.00		
	196	Interest charged for late payment	8/17/2020	\$256.60	\$0.28		8/18/2030	8/17/2030		0	\$0.00	\$0.00	\$0.00
		2018 Reversed Credits/Other			\$0.00		8/18/2030			97	\$0.00		
		2018 Accrued Penalty			\$148.46		8/18/2030			97	\$1.86	\$2.39	\$2.10
		2018 Accrued Interest			\$112.56		8/18/2030			97	\$1.41	\$1.81	\$1.59
		2018 Total IA Payments									\$3.27		
2017	150	Tax return filed	6/13/2022	\$5,808.00	\$5,808.00		6/14/2032	6/13/2032		0	\$61.63	\$93.56	\$82.12
	276	Penalty for late payment of tax	6/13/2022	\$1,452.00	\$1,452.00		6/14/2032	6/13/2032		0	\$15.41	\$23.39	\$20.53
	170	Penalty for not pre-paying tax	6/13/2022	\$139.00	\$139.00		6/14/2032	6/13/2032		0	\$1.47	\$2.24	\$1.97
	166	Penalty for filing tax return after the	6/13/2022	\$1,306.80	\$1,306.80		6/14/2032	6/13/2032		0	\$13.87	\$21.05	\$18.48
	196	Interest charged for late payment	6/13/2022	\$1,330.72	\$1,330.72		6/14/2032	6/13/2032		0	\$14.12	\$21.44	\$18.81
		2017 Reversed Credits/Other			\$0.00		6/14/2032			120	\$0.00		
		2017 Accrued Penalty			\$0.00		6/14/2032			120	\$0.00		
		2017 Accrued Interest			\$82.27		6/14/2032			120	\$0.87	\$1.33	\$1.16
		2017 Total IA Payments									\$107.37		
2016	150	Tax return filed	6/5/2017	\$3,583.00	\$0.00		6/6/2027	6/5/2027		0-	\$0.00		
	276	Penalty for late payment of tax	6/5/2017	\$35.83	\$0.00		6/6/2027	6/5/2027		0-	\$0.00		

CSED CALCULATIONS AND IA PAYMENTS (cont.)

Year	Code	Assessment	Date	Original Assessed Amount	Remaining Balance	Estimated Total Tolling Days	Estimated THS Calculated CSED	IRS CSED	CSED Days Variation	Months Until CSED	Estimated IA Payments CSED (Including Daily Accrued Interest)**	Estimated IA Payments 72 Mths (Including Daily Accrued Interest)**	Estimated IA Payments 84 Mths (Including Daily Accrued Interest)**
2016													
	170	Penalty for not pre-paying tax	6/5/2017	\$35.00	\$0.00		6/6/2027	6/5/2027	0 -		\$0.00		
	196	Interest charged for late payment	6/5/2017	\$20.08	\$0.00		6/6/2027	6/5/2027	0 -		\$0.00		
	290	Additional tax assessed	12/25/2017	\$1,871.00	\$0.00		12/26/2027	12/25/2027	0 -		\$0.00		
	276	Penalty for late payment of tax	6/4/2018	\$505.59	\$0.00		12/26/2027	uk	-		\$0.00		
	196	Interest charged for late payment	6/4/2018	\$246.87	\$0.37		12/26/2027	uk		65	\$0.01	\$0.01	\$0.01
		2016 Reversed Credits/Other			\$0.00		12/26/2027			65	\$0.00		
		2016 Accrued Penalty			\$822.07		12/26/2027			65	\$14.47	\$14.47	\$14.47
		2016 Accrued Interest			\$955.01		12/26/2027			65	\$16.81	\$16.81	\$16.81
		2016 Total IA Payments									\$31.29		
2015													
	150	Tax return filed	6/6/2016	\$1,320.00	\$0.00		6/7/2026	6/6/2026	0 -		\$0.00		
	276	Penalty for late payment of tax	6/6/2016	\$13.20	\$0.00		6/7/2026	6/6/2026	0 -		\$0.00		
	170	Penalty for not pre-paying tax	6/6/2016	\$24.00	\$0.00		6/7/2026	6/6/2026	0 -		\$0.00		
	196	Interest charged for late payment	6/6/2016	\$7.52	\$0.00		6/7/2026	6/6/2026	0 -		\$0.00		
	276	Penalty for late payment of tax	6/5/2017	\$151.80	\$0.00		6/7/2026	uk	-		\$0.00		
	196	Interest charged for late payment	6/5/2017	\$55.44	\$0.00		6/7/2026	uk	-		\$0.00		
	276	Penalty for late payment of tax	6/4/2018	\$158.40	\$0.00		6/7/2026	uk	-		\$0.00		
	196	Interest charged for late payment	6/4/2018	\$66.89	\$0.25		6/7/2026	uk		46	\$0.01	\$0.01	\$0.01
		2015 Reversed Credits/Other			\$0.00		6/7/2026			46	\$0.00		
		2015 Accrued Penalty			\$6.60		6/7/2026			46	\$0.16	\$0.16	\$0.16
		2015 Accrued Interest			\$272.41		6/7/2026			46	\$6.52	\$6.52	\$6.52
		2015 Total IA Payments									\$6.69		
2014													
	150	Tax return filed	8/24/2015	\$4,275.00	\$0.00		8/25/2025	8/24/2025	0 -		\$0.00		
	276	Penalty for late payment of tax	8/24/2015	\$106.87	\$0.00		8/25/2025	8/24/2025	0 -		\$0.00		
	170	Penalty for not pre-paying tax	8/24/2015	\$77.00	\$0.00		8/25/2025	8/24/2025	0 -		\$0.00		
	166	Penalty for filing tax return after the	8/24/2015	\$577.12	\$0.00		8/25/2025	8/24/2025	0 -		\$0.00		
	196	Interest charged for late payment	8/24/2015	\$52.52	\$0.00		8/25/2025	8/24/2025	0 -		\$0.00		
	360	Fees and other expenses for collection	1/2/2017	\$20.00	\$0.00		8/25/2025	uk	-		\$0.00		
	276	Penalty for late payment of tax	6/5/2017	\$876.38	\$0.00		8/25/2025	uk	-		\$0.00		
	196	Interest charged for late payment	6/5/2017	\$343.21	\$0.00		8/25/2025	uk	-		\$0.00		
	276	Penalty for late payment of tax	6/4/2018	\$85.50	\$0.00		8/25/2025	uk	-		\$0.00		
	196	Interest charged for late payment	6/4/2018	\$269.25	\$0.00		8/25/2025	uk	-		\$0.00		
	196	Interest charged for late payment	6/21/2021	\$0.15	\$0.00		8/25/2025	uk	-		\$0.00		
		2014 Reversed Credits/Other			\$0.00		8/25/2025			0			
		2014 Accrued Penalty			\$0.00		8/25/2025			0			
		2014 Accrued Interest			\$1,012.70		8/25/2025			0			
		2014 Total IA Payments									\$0.00		

CSED TOLLING CALCULATIONS

Year	Code	Explanation of Transaction	Start Date	End Date	End Code	Tolling Days	Additional Tolling Days	Total Days
2021		No Tolling Events Found						
2020		No Tolling Events Found						
2019		No Tolling Events Found						
2018		No Tolling Events Found						
2017		No Tolling Events Found						
2016		No Tolling Events Found						
2015		No Tolling Events Found						
2014		No Tolling Events Found						
2013		No Tolling Events Found						
2012		No Tolling Events Found						
2011		No Tolling Events Found						
2010		No Tolling Events Found						

? = 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.

IRS NOTICES

Tax Year	Notice Number	Notice Issued	Date
2021			
		Notice issued NOTICE1444	4/10/2021
2020			
		Notice issued NOTICE1444	7/20/2020
2019			
	CP 0014	Notice issued	11/23/2020
		Collection referred to a private debt collection agency	12/28/2020
	CP 0040	Notice issued	12/28/2020
2018			
	CP 0014	Notice issued	8/17/2020
		Collection referred to a private debt collection agency	9/21/2020
	CP 0040	Notice issued	9/21/2020
2017			
	CP 0014	Notice issued	6/13/2022
		Collection referred to a private debt collection agency	7/18/2022
	CP 0040	Notice issued	7/18/2022
2016			
	CP 0014	Notice issued	6/5/2017
	CP 0021	Notice issued	12/25/2017
	CP 071C	Notice issued	6/4/2018
		Collection referred to a private debt collection agency	11/25/2019
	CP 0040	Notice issued	11/25/2019
2015			
	CP 0014	Notice issued	6/6/2016
		Issued notice of lien filing and right to Collection Due Process hearing	12/13/2016
	CP 071C	Notice issued	6/5/2017
	CP 071C	Notice issued	6/4/2018
		Collection referred to a private debt collection agency	11/25/2019
	CP 0040	Notice issued	11/25/2019
2014			
	CP 0014	Notice issued	8/24/2015
		Issued notice of lien filing and right to Collection Due Process hearing	12/13/2016
	CP 071C	Notice issued	6/5/2017
	CP 071C	Notice issued	6/4/2018
		Collection referred to a private debt collection agency	11/25/2019
	CP 0040	Notice issued	11/25/2019

IRS NOTICE DEFINITIONS

Notice Number	IRS Notice Definitions
CP14	If you received an IRS CP14 Notice, you owe money on unpaid taxes. Pay the amount you owe, establish a payment plan or call if you disagree with the amount.
CP21	You received a CP21 Notice because we made the change(s) you requested to your tax return for the tax year specified on the notice. You owe money on your taxes as a result of the change(s).
CP40	If you received an IRS CP40 Notice, the IRS has assigned your tax account to a private collection agency.

IRS ACCOUNT SUMMARY

Tax Year	Code	Explanation of Transaction	Date	Amount
2022				
		No Account Transcript Found		
2021				
	846	Refund issued	3/26/2021	\$1,400
	290	Additional tax assessed 00-00-0000	4/5/2021	\$0
	766	Tax relief credit	4/5/2021	(\$1,400)
	971	Notice issued NOTICE1444	4/10/2021	\$0
	290	Additional tax assessed 00-00-0000	5/24/2021	\$0
	960	Appointed representative	6/11/2021	\$0
	460	Extension of time to file tax return ext. Date 10-15-2022	2/5/2022	\$0
	610	Payment with return	3/9/2022	(\$908)
	150	Tax return filed	4/4/2022	\$13,911
	766	Credit to your account	4/15/2022	(\$3,000)
	806	W-2 or 1099 withholding	4/15/2022	(\$10,003)
2020				
	846	Refund issued	7/13/2020	\$1,200
	290	Additional tax assessed 00-00-0000	7/20/2020	\$0
	766	Tax relief credit	7/20/2020	(\$1,200)
	971	Notice issued NOTICE1444	7/20/2020	\$0
	846	Refund issued	1/6/2021	\$600
	290	Additional tax assessed 00-00-0000	1/18/2021	\$0
	766	Tax relief credit	1/18/2021	(\$600)
	960	Appointed representative	3/26/2021	\$0
	460	Extension of time to file tax return ext. Date 10-15-2021	4/20/2021	\$0
	610	Payment with return	4/26/2021	(\$6,802)
	150	Tax return filed	5/17/2021	\$6,697
	170	Penalty for not pre-paying tax 05-17-2031	5/17/2021	\$105
2019				
	460	Extension of time to file tax return ext. Date 10-15-2020	7/11/2020	\$0
	150	Tax return filed	11/23/2020	\$6,028
	170	Penalty for not pre-paying tax 11-23-2030	11/23/2020	\$112
	196	Interest charged for late payment	11/23/2020	\$65
	276	Penalty for late payment of tax	11/23/2020	\$151
	971	Notice issued CP 0014	11/23/2020	\$0
	530	Balance due account currently not collectible - not due to hardship	12/12/2020	\$0
	971	Collection referred to a private debt collection agency	12/28/2020	\$0
	971	Notice issued CP 0040	12/28/2020	\$0
	960	Appointed representative	3/26/2021	\$0
	670	Payment	6/1/2021	(\$6,356)
	276	Penalty for late payment of tax	6/21/2021	\$0
2018				
	460	Extension of time to file tax return ext. Date 10-15-2019	4/6/2019	\$0
	150	Tax return filed	8/17/2020	\$3,299
	166	Penalty for filing tax return after the due date 08-17-2030	8/17/2020	\$742
	196	Interest charged for late payment	8/17/2020	\$257
	276	Penalty for late payment of tax	8/17/2020	\$280
	971	Notice issued CP 0014	8/17/2020	\$0
	530	Balance due account currently not collectible - not due to hardship	9/5/2020	\$0
	971	Collection referred to a private debt collection agency	9/21/2020	\$0
	971	Notice issued CP 0040	9/21/2020	\$0

IRS ACCOUNT SUMMARY (cont.)

Tax Year	Code	Explanation of Transaction	Date	Amount
2018				
	960	Appointed representative	3/26/2021	\$0
	670	Payment	5/28/2021	(\$4,578)
2017				
	460	Extension of time to file tax return ext. Date 10-15-2018	4/3/2018	\$0
	960	Appointed representative	3/26/2021	\$0
	150	Tax return filed	6/13/2022	\$5,808
	166	Penalty for filing tax return after the due date 06-13-2032	6/13/2022	\$1,307
	170	Penalty for not pre-paying tax 06-13-2032	6/13/2022	\$139
	196	Interest charged for late payment	6/13/2022	\$1,331
	276	Penalty for late payment of tax	6/13/2022	\$1,452
	971	Notice issued CP 0014	6/13/2022	\$0
	530	Balance due account currently not collectible - not due to hardship	7/2/2022	\$0
	971	Collection referred to a private debt collection agency	7/18/2022	\$0
	971	Notice issued CP 0040	7/18/2022	\$0
2016				
	960	Appointed representative	2/9/2017	\$0
	150	Tax return filed	6/5/2017	\$3,583
	170	Penalty for not pre-paying tax 06-05-2027	6/5/2017	\$35
	196	Interest charged for late payment	6/5/2017	\$20
	276	Penalty for late payment of tax	6/5/2017	\$36
	971	Notice issued CP 0014	6/5/2017	\$0
	971	Tax period blocked from automated levy program	8/7/2017	\$0
	971	Amended tax return or claim forwarded for processing	10/2/2017	\$0
	977	Amended return filed	10/2/2017	\$0
	971	First Levy Issued on Module	10/9/2017	\$0
	290	Additional tax assessed 12-25-2027	12/25/2017	\$1,871
	971	Notice issued CP 0021	12/25/2017	\$0
	196	Interest charged for late payment	6/4/2018	\$247
	276	Penalty for late payment of tax	6/4/2018	\$506
	971	Notice issued CP 071C	6/4/2018	\$0
	530	Balance due account currently not collectible - not due to hardship	3/11/2019	\$0
	971	Collection referred to a private debt collection agency	11/25/2019	\$0
	971	Notice issued CP 0040	11/25/2019	\$0
	670	Payment	5/28/2021	(\$6,297)
2015				
	150	Tax return filed	6/6/2016	\$1,320
	170	Penalty for not pre-paying tax 06-06-2026	6/6/2016	\$24
	196	Interest charged for late payment	6/6/2016	\$8
	276	Penalty for late payment of tax	6/6/2016	\$13
	971	Notice issued CP 0014	6/6/2016	\$0
	971	Tax period blocked from automated levy program	8/15/2016	\$0
	582	Lien placed on assets due to balance owed	12/9/2016	\$0
	971	Issued notice of lien filing and right to Collection Due Process hearing	12/13/2016	\$0
	960	Appointed representative	2/9/2017	\$0
	971	First Levy Issued on Module	4/17/2017	\$0
	196	Interest charged for late payment	6/5/2017	\$55
	276	Penalty for late payment of tax	6/5/2017	\$152
	971	Notice issued CP 071C	6/5/2017	\$0
	196	Interest charged for late payment	6/4/2018	\$67
	276	Penalty for late payment of tax	6/4/2018	\$158

IRS ACCOUNT SUMMARY (cont.)

Tax Year	Code	Explanation of Transaction	Date	Amount
2015				
	971	Notice issued CP 071C	6/4/2018	\$0
	530	Balance due account currently not collectible - not due to hardship	3/11/2019	\$0
	971	Collection referred to a private debt collection agency	11/25/2019	\$0
	971	Notice issued CP 0040	11/25/2019	\$0
	670	Payment	5/27/2021	(\$1,797)
2014				
	150	Tax return filed	8/24/2015	\$4,275
	166	Penalty for filing tax return after the due date 08-24-2025	8/24/2015	\$577
	170	Penalty for not pre-paying tax 08-24-2025	8/24/2015	\$77
	196	Interest charged for late payment	8/24/2015	\$53
	276	Penalty for late payment of tax	8/24/2015	\$107
	971	Notice issued CP 0014	8/24/2015	\$0
	530	Balance due account currently not collectible - not due to hardship	10/9/2015	\$0
	531	Account currently considered collectible	7/18/2016	\$0
	971	Tax period blocked from automated levy program	10/24/2016	\$0
	582	Lien placed on assets due to balance owed	12/9/2016	\$0
	971	Issued notice of lien filing and right to Collection Due Process hearing	12/13/2016	\$0
	360	Fees and other expenses for collection	1/2/2017	\$20
	960	Appointed representative	2/9/2017	\$0
	971	First Levy Issued on Module	4/17/2017	\$0
	196	Interest charged for late payment	6/5/2017	\$343
	276	Penalty for late payment of tax	6/5/2017	\$876
	971	Notice issued CP 071C	6/5/2017	\$0
	196	Interest charged for late payment	6/4/2018	\$269
	276	Penalty for late payment of tax	6/4/2018	\$86
	971	Notice issued CP 071C	6/4/2018	\$0
	530	Balance due account currently not collectible - not due to hardship	3/11/2019	\$0
	971	Collection referred to a private debt collection agency	11/25/2019	\$0
	971	Notice issued CP 0040	11/25/2019	\$0
	670	Payment	5/27/2021	(\$6,683)
	196	Interest charged for late payment	6/21/2021	\$0
2013				
		No tax return filed		
	960	Appointed representative	2/9/2017	\$0
2012				
		No tax return filed		
	960	Appointed representative	2/9/2017	\$0
2011				
		No tax return filed		
	960	Appointed representative	2/9/2017	\$0
2010				
		No tax return filed		
	960	Appointed representative	2/9/2017	\$0

PAYMENT, CREDIT, ABATEMENT HISTORY*

Tax Year	Code	Explanation of Transaction	Date	Amount
2021				
	766	Tax relief credit	4/5/2021	-1400
	610	Payment with return	3/9/2022	-908
	766	Credit to your account	4/15/2022	-3000
	806	W-2 or 1099 withholding	4/15/2022	-10003
2020				
	766	Tax relief credit	7/20/2020	-1200
	766	Tax relief credit	1/18/2021	-600
	610	Payment with return	4/26/2021	-6802
2019				
	670	Payment	6/1/2021	-6356
2018				
	670	Payment	5/28/2021	-4578
2016				
	670	Payment	5/28/2021	-6297
2015				
	670	Payment	5/27/2021	-1797
2014				
	670	Payment	5/27/2021	-6683

*Does not include Civil Penalty amounts

PENALTY AND INTEREST DASHBOARD

Year	Return Filed	FTA	PA	Penalties Failure to File	Penalties Failure to Pay	Accuracy Related Penalties	Accrued Penalty	Total Penalties*	Accrued Interest	Assessed Interest	Total Interest
2022	-						-	-	-	\$0.00	-
2021	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2020	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2019	Original	N			\$150.93		\$180.61	\$331.54	\$102.64	\$65.07	\$167.71
2018	Original	N		\$742.27	\$280.41		\$148.46	\$1,171.14	\$112.56	\$256.60	\$369.16
2017	Original	N		\$1,306.80	\$1,452.00		\$0.00	\$2,758.80	\$82.27	\$1,330.72	\$1,412.99
2016	Amended	N			\$541.42		\$822.07	\$1,363.49	\$955.01	\$266.95	\$1,221.96
2015	Original	N			\$323.40		\$6.60	\$330.00	\$272.41	\$129.85	\$402.26
2014	Original	Y		\$577.12	\$1,068.75		\$0.00	\$1,645.87	\$1,012.70	\$665.13	\$1,677.83
2013	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2012	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2011	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2010	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Totals			\$2,626.19	\$3,816.91	\$0.00	\$1,157.74	\$7,600.84	\$2,537.59	\$2,714.32	\$5,251.91

*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 ASED*	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)*
2022	-							
2021	Original	4/15/2022	10/15/2022	10/15/2025	10/15/2025	10/15/2025	\$13,911.00	\$13,911.00
2020	Original	4/15/2021	10/15/2021	10/15/2024	10/15/2024	10/15/2024	\$6,802.00	\$6,802.00
2019	Original	10/15/2020	10/15/2020	10/15/2023	10/15/2023	10/15/2023	\$6,356.00	\$6,356.00
2018	Original	6/20/2020	10/15/2019	6/20/2023	10/15/2022	6/20/2023	\$4,578.00	\$4,578.00
2017	Original	11/23/2021	10/15/2018	11/23/2024	10/15/2021	11/23/2024	expired	\$0.00
2016	Amended	4/15/2017	4/15/2017	4/15/2020	4/15/2020	4/15/2020	expired	\$6,297.00
2015	Original	4/15/2016	4/15/2016	4/15/2019	4/15/2019	4/15/2019	expired	\$1,797.00
2014	Original	7/15/2015	4/15/2015	7/15/2018	4/15/2018	7/15/2018	expired	\$6,683.00
2013	No	none	4/15/2014	open	4/15/2017	not filed	expired	\$0.00
2012	No	none	4/15/2013	open	4/15/2016	not filed	expired	\$0.00
2011	No	none	4/15/2012	open	4/15/2015	not filed	expired	\$0.00
2010	No	none	4/15/2011	open	4/15/2014	not filed	expired	\$0.00

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

RESOLUTION AND COLLECTION DASHBOARD

Year	Accrued Balance	Return Filed	SFR Filed Date	Final Notice of Intent To Levy Date	Collections Active	Last Activity	Last Activity Date	Estimated CSED IA Payments*	Estimated 72 Mth IA Payments*	Estimated 84 Mth IA Payments*
2022	-	-						\$0.00		
2021	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
2020	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
2019	\$283.25	Original	none	none		Balance due account currently not collectible - not	12/12/2020	\$0.00	\$0.00	\$0.00
2018	\$261.30	Original	none	none	No	Balance due account currently not collectible - not	9/5/2020	\$3.27	\$4.20	\$3.69
2017	\$10,118.79	Original	none	none	No	Balance due account currently not collectible - not	7/2/2022	\$107.37	\$163.01	\$143.07
2016	\$1,777.45	Amended	none	none	No	Balance due account currently not collectible - not	3/11/2019	\$31.29	\$31.29	\$31.29
2015	\$279.26	Original	none	none	No	Balance due account currently not collectible - not	3/11/2019	\$6.69	\$6.69	\$6.69
2014	\$1,012.70	Original	none	none		Balance due account currently not collectible - not	3/11/2019	\$0.00	\$0.00	\$0.00
2013	\$0.00	No	none	none				\$0.00		
2012	\$0.00	No	none	none				\$0.00		
2011	\$0.00	No	none	none				\$0.00		
2010	\$0.00	No	none	none				\$0.00		
						Total Estimated IA Payment (Does Not Include SRP)*		\$148.62	\$205.19	\$184.74

*Includes IRS daily accrued interest of 5% APR.