

## Resolution Readiness Report

Tax Filing Compliance	UNKNOWN	Active Audit or Exam	NO	Upcoming Appeal Deadline	YES
In Active Collections	NO	Assigned To Private Collections Agency	NO	Passport Certified For Revocation	NO
Penalty Abatement Opportunity	YES	Tax Lien Filed	NO	Estimated Monthly Payment	\$222.07

Year	Return Filed	Filing Status	Lien Active	Final Notice of Intent to Levy	Collections Active	Exam/Audit Active	THS Calculated CSED	Last Activity	Last Activity Date	Total Balance
2023	-	UK								-
2022	-	UK								-
2021	Original	MFJ		none	No		8/6/2032	Installment agreement established	8/5/2022	\$393.68
2020	Original	MFJ		none			6/15/2031			\$0.00
2019	Original	MFJ		none						\$0.00
2018	Original	MFJ		none			9/10/2029			\$0.00
2017	Original	MFJ		2/14/2022	No	Closed	9/12/2028 to 11/10/2031	Installment agreement established	8/5/2022	\$12,624.47
2016	Original	MFJ		none			7/18/2027			\$0.00
2015	Original	MFJ		none			7/26/2026			\$0.00
2014	Original	MFJ		none			7/7/2025			\$0.00
2013	Original	MFJ		none			7/8/2024			\$0.00
2012	Original	MFJ		none			7/2/2023			\$0.00
2011	Original	MFJ		none			4/24/2022			\$0.00
2010	Original	MFJ		none			5/3/2021			\$0.00
							TOTAL			\$13,018.15

\*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

## Resolution Readiness Report

Tax Filing Compliance	UNKNOWN	Missing Tax Transcripts	2022
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In order to qualify for an Installment Agreement the IRS requires that a taxpayer be in compliance with tax return filings for the current year and prior five years. The IRS may waive filing for years where a filing requirement does not exist (see IRM 5.14.1.4.2).

Active Audit or Exam	NO	Tax Periods	
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Frequently, but not always, once a return is selected for examination a transaction code is placed on the account module and should be visible on the account transcript. This is the beginning of the survey period. However, further actions, such as the issuing of IRS notices or the Notice of Deficiency, are not usually represented on Account Transcript. A call to the IRS is frequently required to confirm status of the exam.

Upcoming Appeal Deadline	YES	
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Deadline Date	Type	Tax Periods
2/14/2023	Final Notice of Intent to Levy - Equivalency Hearing	2017

Final Notice of Intent to Levy – Can elect a timely Collection Due Process (CDP) Hearing by filing Form 12153 within 30 days, starting the day after the Notice of Intent to Levy was Issued. An Equivalency Hearing can be elected by filing Form 12153 within one year, starting the day after the Notice of Intent to Levy was Issued.  
 Notice of Federal Tax Lien – Can elect a timely Collection Due Process (CDP) Hearing by filing Form 12153 within 30 days, starting 5 business days after filing of the NFTL. An Equivalency Hearing can be elected by filing Form 12153 within one year, starting 5 business days after filing of the NFTL.

In Active Collections	NO	A taxpayer is in active collections when the IRS has met all required pre levy notifications and may levy the taxpayer at any time without additional notification being legally required.
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Assigned to Private Collections Agency	NO	Congress requires the IRS to hire Private Collection Agencies (PCA) to assist in collecting certain overdue tax accounts. Notice CP40 issued by the IRS will contain details on the assigned PCA and a taxpayer authentication number which will be needed to speak with the PCA.
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Passport Certified for Revocation	NO	The Fixing America's Surface Transportation (FAST) Act requires the IRS to certify seriously delinquent taxes to the State Department for potential revocation or denial of the taxpayer's passport. IRS Notice CP508C will be issued upon certifying the debt, the State Department will notify the taxpayer in writing if their passport is revoked, or an application is denied.
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Eligible for First Time Abatement	YES	
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Year	Penalties Failure to File	Penalties Failure to Pay	Accrued Penalties	Total Abatable Penalties	Active Balance and/or RSED
2017	\$547.60	\$0.00	\$1,179.98	\$3,208.18	\$12,624.47

Tax Lien Filed	NO	Tax Periods	
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Streamline Installment Agreement	YES	\$222.07	Non Streamline Installment Agreement	YES	\$163.75
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In order to be eligible for an IRS Installment Agreement ALL required compliance returns must be on file.  
 Installment Agreement figures are estimates and based on the IRS transcripts provided. Minimum Installment Agreement amounts may vary based on additional balance dues not present on this report.

A Streamline Installment Agreement offered by the IRS to Individuals with assessed balances under \$50k which generally prevents the filing of a tax lien. See IRM 5.14.5.2.  
 A Non Streamlined Installment Agreement is considered when the taxpayer cannot qualify for a Streamline Installment Agreement. The agreement must be fully paid prior to the Collection Statute Expiration Date. A Collection Information Statement is not required for Individual balances under \$250k assessed assigned to Automated Collection System (ACS). A tax lien required. See IRM 5.19.1.6.4(12).

If not eligible, or cannot afford, a Streamlined or Non Streamlined Installment Agreement complete a Collection Information Statement to determine potential qualification for a Partial Pay Installment Agreement (PPIA), Currently Non Collectible (CNC), or an Offer in Compromise (OIC).

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Tax Lien Filed	NO	Tax Periods	
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Intake Notes	<p>Taxpayer Income Trend? = Same          Is Taxpayer in resolution? = Yes          Current resolution monthly payment? = 50.00          433 prepared? = No          MDI amount? =          Taxpayer maximum monthly payment? = 100.00          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: have client who brought us a 90-day letter on the date that it expired.          Client is an Uber driver. IRS audited client's Schedule C and the adjustments</p> <p>resulted in a liability of \$11,700.00. Tax was assessed in August 2021. Estimated CSED is August 2031.</p> <p>Client had a temporary address in another state and took the deduction for travel expenses. He was interested in an amended tax return for 2017. I thought that this client should pursue an audit reconsideration to address this tax liability.</p> <p>Clients would like to have an audit reconsideration. Documents have been prepared to substantiate expenses.</p> <p>What would be my steps to request an audit reconsideration? Currently, clients have an installment agreement for \$50.00 per month which is scheduled to increase to \$211.00 on September 28, 2023.</p>
Collectability Opinion	HIGH – relatively low balance with long CSED
Criminal Evaluation	LOW – balance due under \$100K
Summary & Strategy	<p>***Check the THS Post Filing Income Verification report, possible underreported income for 2019, 2020, and 2021. Review, discuss with client, and file 1040X(s) if appropriate.</p> <p>When it comes to disputing the exam results there are 3 possible options you can pursue:</p> <ol style="list-style-type: none"> <li>1. Reconsideration             <ol style="list-style-type: none"> <li>a. Prepare package with cover letter explicating stating what you want, i.e. reconsideration to account for expenses resulting from self employment and reduction in assessment, along with bullet points of documents included.</li> <li>b. Provide proof already assembled, including a draft schedule C and/or draft 1040X. Keep organized and notate where necessary.</li> <li>c. Mail entire package to the address on the Notice of Deficiency via certified mail (or other tracking method), follow up with a call to the IRS at the 45-60 day mark to ensure receipt and being worked. Use number on NOD or correspondence exam line at 1-866-897-0177.</li> <li>d. Expect it to take several months for a decision. No appeal rights on the decision.</li> </ol> </li> </ol>

	<ul style="list-style-type: none"><li>2. Equivalent Hearing<ul style="list-style-type: none"><li>a. TIME SENSITIVE: have until <b>2/14/2023</b> to elect an equivalency hearing based on date the Final Notice of Intent to Levy was issued. NOTE: beware of prior opportunity (IRM 8.22.4.2.2)</li><li>b. Same package as for reconsideration but include a Form 12156.</li><li>c. Mail to assigned collections unit (Automated Collections System), whichever address is on balance due notices the client has received (i.e. Ogden, Cincinnati, Fresno, Kansas City, Austin)</li><li>d. Expect 6-9 months for a decision, can call 1-855-233-1267 to check on status. No tax court rights on decision.</li><li>e. Will be assigned to an Appeals Officer independent of collections, has a vested interest in resolving and will result in a phone hearing.</li></ul></li><li>3. OIC Doubt as to Liability<ul style="list-style-type: none"><li>a. Should generally be used as a last resort when all other options have been expired.</li><li>b. Same package as reconsideration but include form 656-L.</li><li>c. Expect 9-12 months for a decision.</li><li>d. Collections is prevented AND Collection Statute Expiration Dates (CSEDs) are tolled.</li></ul></li></ul> <p>Have a few videos in the library that may assist.</p> <ul style="list-style-type: none"><li>1. Dealing with Closed Exams available at <a href="#">Members: Continuing Education – Tax Mentor</a></li><li>2. Properly Responding to Exams available at <a href="#">Members: Skill Drills – Tax Mentor</a></li></ul>
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# IRS Tax Account Analysis

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TAXPAYER IRS ACCOUNT ANALYSIS

Tax Year	Return Filed	Filing Status	Total Taxes	Total Penalties & Interest	Current IRS Balance Owed	Transcript Date	Year Status
2022	-	Uk	\$0.00	\$0.00	-	not found	✔
2021	Original	MFJ	\$2,972.00	\$17.68	\$393.68	1/18/2023	✘
2020	Original	MFJ	\$1,789.00	\$0.00	\$0.00	1/18/2023	✔
2019	Original	MFJ	\$0.00	\$0.00	\$0.00	1/18/2023	✔
2018	Original	MFJ	\$184.00	\$0.00	\$0.00	1/18/2023	✔
2017	Original	MFJ	\$9,686.00	\$5,371.47	\$12,624.47	1/18/2023	✘
2016	Original	MFJ	\$6,798.00	\$12.00	\$0.00	1/18/2023	✔
2015	Original	MFJ	\$6,722.00	\$0.00	\$0.00	1/18/2023	✔
2014	Original	MFJ	\$9,581.00	\$0.00	\$0.00	1/18/2023	✔
2013	Original	MFJ	\$6,829.00	\$0.00	\$0.00	1/18/2023	✔
2012	Original	MFJ	\$5,677.00	\$0.00	\$0.00	1/18/2023	✔
2011	Original	MFJ	\$5,266.00	\$0.00	\$0.00	1/18/2023	✔
2010	Original	MFJ	\$5,715.00	\$0.00	\$0.00	1/18/2023	✔
Totals:			\$61,219.00	\$5,401.15	\$13,018.15		

Return Filed Definitions:

Original = Return filed	SFR = IRS filed return with no deductions or credits
Amended = Amended return filed	No = no return filed
	RDNF = IRS has no data

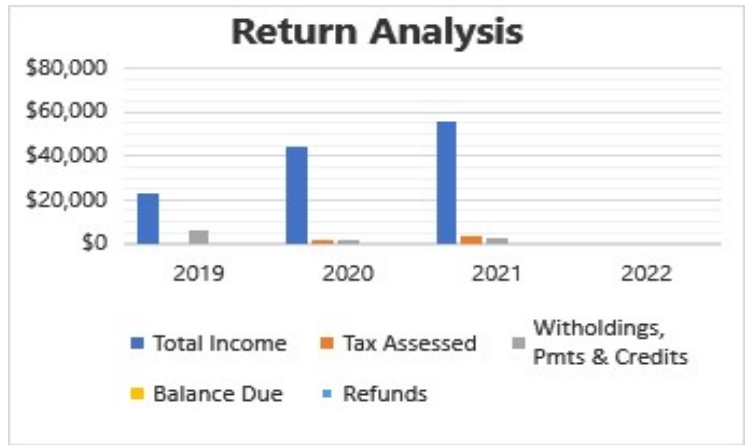
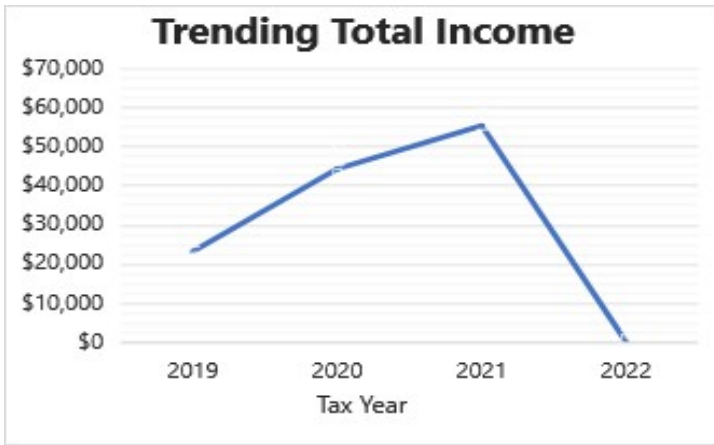
Opportunities:

- 2017 - First Time Penalty Abatement possible refund of \$548
- 2020 - Earned Income Tax Credit not claimed for this year but claimed in: 2019
- 2021 - Earned Income Tax Credit not claimed for this year but claimed in: 2019

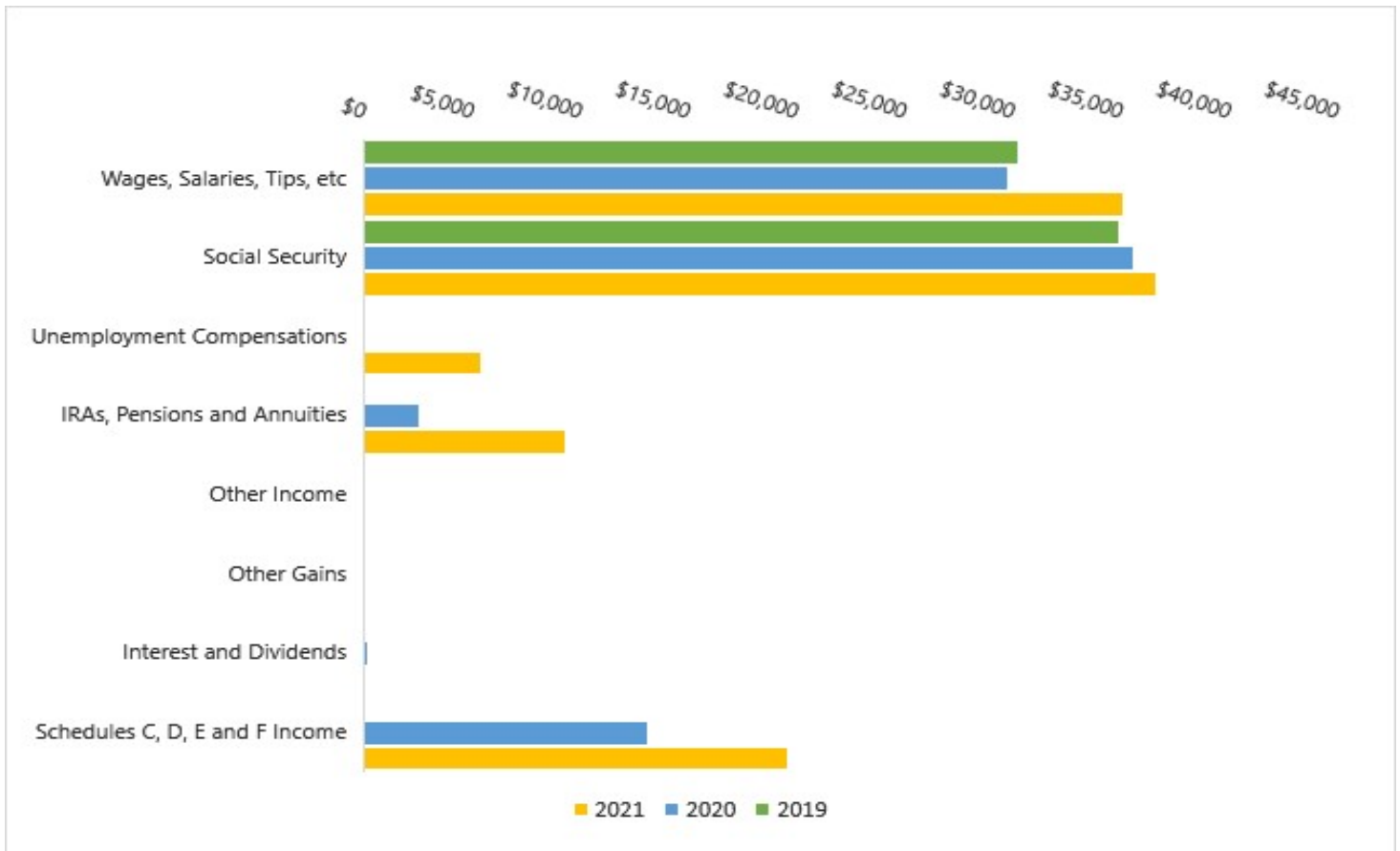
Issues:

- 2017 - Taxes owed for this tax year: \$12,624
- 2021 - Taxes owed for this tax year: \$394

## Taxpayer IRS Account Analysis



### Income Breakdown



Income Breakdown	2019	2020	2021
Wage & Income Transcript Date	1/18/2023	1/18/2023	1/18/2023
Wages, Salaries, Tips, etc	\$30,205	\$29,730	\$34,990
Social Security	\$34,788	\$35,458	\$36,527
Unemployment Compensations	\$0	\$0	\$5,319
IRAs, Pensions and Annuities	\$10	\$2,500	\$9,216
Other Income	\$0	\$0	\$0
Other Gains	\$0	\$0	\$0
Interest and Dividends	\$0	\$121	\$0
Schedules C, D, E and F Income	\$0	\$13,060	\$19,512

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2010	Original	MFJ	\$5,715.00	\$0.00	\$0.00	1/18/2023	✔
Totals:			\$51,638.00	\$5,401.15	\$13,018.15		

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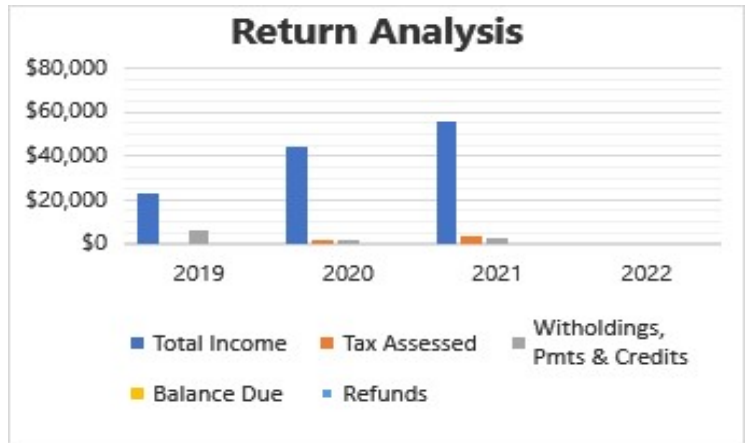
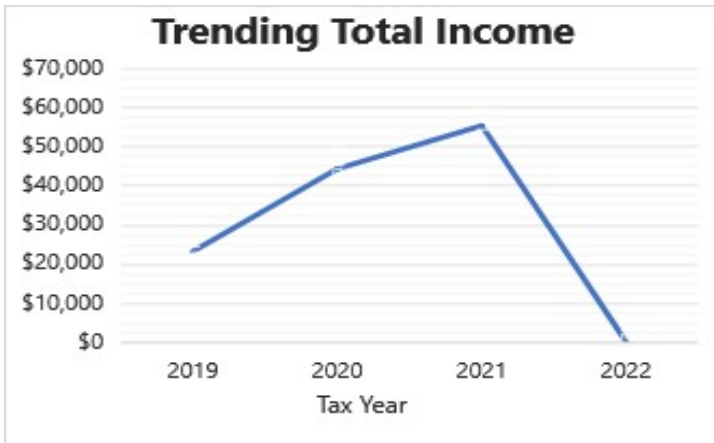
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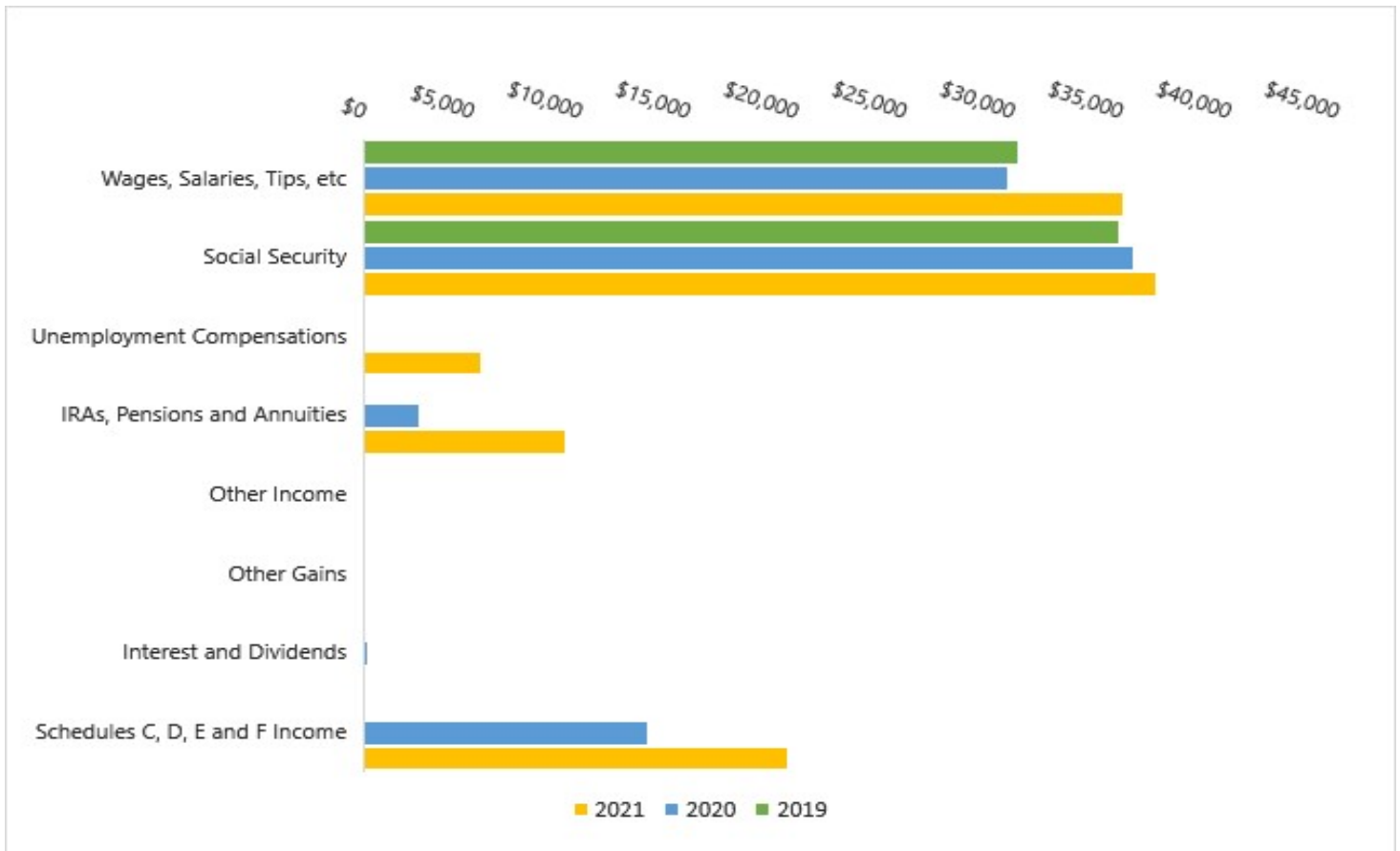
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Schedules C, D, E and F Income	\$0	\$13,060	\$19,512

IRS ACCOUNT STATUS DASHBOARD

**	Year	Return Filed	Filing Status	Extension Date	Lien Active	Collections Active	Examination Active	Assessed Balance	Accrued Balance	Transcript Date
B	2023	-	Uk					-	-	not found
B	2022	-	Uk					-	-	not found
B	2021	Original	MFJ	10/15/2022		No		\$379.38	\$393.68	1/18/2023
B	2020	Original	MFJ					\$0.00	\$0.00	1/18/2023
B	2019	Original	MFJ					\$0.00	\$0.00	1/18/2023
B	2018	Original	MFJ					\$0.00	\$0.00	1/18/2023
B	2017	Original	MFJ			No	Closed	\$10,783.92	\$12,624.47	1/18/2023
B	2016	Original	MFJ					\$0.00	\$0.00	1/18/2023
B	2015	Original	MFJ					\$0.00	\$0.00	1/18/2023
T	2014	Original	MFJ					\$0.00	\$0.00	1/18/2023
S	2014	No	S					\$0.00	\$0.00	1/18/2023
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B	2011	Original	MFJ					\$0.00	\$0.00	1/18/2023
B	2010	Original	MFJ					\$0.00	\$0.00	1/18/2023
							Total	\$11,163.30	\$13,018.15	

\*\*T = Taxpayer  
 S = Spouse  
 B = Both

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WAGE INCOME SUMMARY

** Definitions	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022 Totals	
T Transcript Date:	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	not found	
T Non-employee Compensation:	\$4,422	\$0	\$17,650	\$25,384	\$19,008	\$12,173	\$0	-	-	-	\$78,637
T Medicare Wages:	\$29,102	\$31,836	-	-	-	-	-	-	-	-	\$60,938
T Taxable FICA Wages:	\$29,102	\$31,836	-	-	-	-	-	-	-	-	\$60,938
T Wages:	\$29,102	\$31,836	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$60,938
T Party Transactions:	-	-	-	-	-	\$25,633	\$32,701	-	-	-	\$58,334
T Pensions and Annuities:	\$0	\$0	\$0	\$0	\$0	\$8,246	\$14,526	\$14,761	\$15,435	-	\$52,968
T Nonemployee Compensation :	-	-	-	-	-	-	-	\$13,060	-	-	\$13,060
T only):	-	-	-	-	-	-	-	-	\$9,844	-	\$9,844
T (Corrected/Amended):	-	-	-	-	-	-	-	-	\$9,668	-	\$9,668
T April Payments:	-	-	-	-	-	\$4,181	\$2,930	-	-	-	\$7,111
T October Payments:	-	-	-	-	-	\$3,101	\$3,028	-	-	-	\$6,129
T May. Payments:	-	-	-	-	-	\$3,094	\$2,640	-	-	-	\$5,734
T December Payments:	-	-	-	-	-	\$2,308	\$3,148	-	-	-	\$5,456
T November Payments:	-	-	-	-	-	\$2,736	\$2,682	-	-	-	\$5,418
T August Payments:	-	-	-	-	-	\$2,414	\$2,935	-	-	-	\$5,349
T July Payments:	-	-	-	-	-	\$2,328	\$2,896	-	-	-	\$5,224
T Federal Tax Withheld:	\$2,244	\$2,792	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$5,036
T September Payments:	-	-	-	-	-	\$1,824	\$3,206	-	-	-	\$5,030
T March Payments:	-	-	-	-	-	\$1,749	\$2,900	-	-	-	\$4,649
T June Payments:	-	-	-	-	-	\$1,893	\$2,087	-	-	-	\$3,980
T FICA Tax Withheld:	\$1,804	\$1,973	-	-	-	-	-	-	-	-	\$3,777
T February Payments:	-	-	-	-	-	-	\$2,280	-	-	-	\$2,280
T January Payments:	-	-	-	-	-	-	\$1,965	-	-	-	\$1,965
T Other Income:	-	\$1,000	-	-	-	-	-	-	-	-	\$1,000
T Medicare Withheld:	\$421	\$461	-	-	-	-	-	-	-	-	\$882
T Tax Year 2019 Payments:	-	-	-	-	-	-	-	-	\$138	-	\$138
T Tax Year 2020 Payments:	-	-	-	-	-	-	-	-	\$132	-	\$132
T Interest:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$121	\$0	-	\$121
T Tax Year 2018 Payments:	-	-	-	-	-	-	-	-	\$77	-	\$77
T Allocated Tips:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T Capital Gains:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T Dividends:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T Gross Distributions:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T IRA Contributions:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T Mortgage Interest Paid:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T Points Paid:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
T Prior Year Refund:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0

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WAGE INCOME SUMMARY (cont.)

**	Definitions	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Totals
T	Real Estate Sales:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
T	Savings Bonds:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
T	Taxable Amount:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

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WAGE INCOME SUMMARY (cont.)

** Definitions	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022 Totals	
S Transcript Date:	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	not found	
S Medicare Wages:	\$48,199	\$51,811	\$54,191	\$52,508	\$35,966	\$12,906	\$31,710	\$32,018	\$35,142	-	\$354,451
S Taxable FICA Wages:	\$48,199	\$51,811	\$54,191	\$52,508	\$35,966	\$12,906	\$31,710	\$32,018	\$35,142	-	\$354,451
S Wages:	\$48,199	\$51,811	\$54,191	\$52,508	\$35,237	\$12,906	\$30,205	\$29,730	\$34,990	-	\$349,777
S Pensions and Annuities:	\$17,021	\$17,643	\$18,292	\$18,698	\$19,121	\$19,701	\$20,262	\$20,697	\$21,092	-	\$172,527
S Health Coverage:	\$13,310	\$14,089	\$14,574	\$14,472	\$10,389	-	\$13,271	\$17,770	\$1,591	-	\$99,466
S Federal Tax Withheld:	\$4,187	\$4,411	\$5,738	\$5,666	\$4,356	\$525	\$1,420	\$1,965	\$3,297	-	\$31,565
S FICA Tax Withheld:	\$2,988	\$3,212	\$3,359	\$3,255	\$2,229	\$798	\$1,965	\$1,985	\$2,178	-	\$21,969
S Unemployment Compensation:	-	-	-	-	\$7,395	\$5,423	-	-	\$5,319	-	\$18,137
S Gross Distributions:	\$0	\$0	\$0	\$0	\$730	\$0	\$10	\$2,500	\$9,216	-	\$12,456
S Taxable Amount:	\$0	\$0	\$0	\$0	\$730	\$0	\$10	\$2,500	\$9,216	-	\$12,456
S Medicare Withheld:	\$698	\$751	\$785	\$761	\$520	\$186	\$458	\$464	\$508	-	\$5,131
S Deferred Compensation:	-	-	-	-	\$729	-	\$1,504	\$2,288	\$152	-	\$4,673
S Health Savings Account:	-	-	-	-	-	-	-	\$1,200	\$1,200	-	\$2,400
S Current Contributions:	-	-	-	-	-	-	-	\$1,200	\$1,200	-	\$2,400
S MSA Gross Distribution:	-	-	-	-	-	-	-	\$1,098	\$1,261	-	\$2,359
S MSA Fair Market Value:	-	-	-	-	-	-	\$1,200	\$92	-	-	\$1,292
S Prior Year Refund:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$786	\$0	-	\$786
S Interest:	\$16	\$15	\$12	\$12	\$11	\$0	\$0	\$0	\$0	-	\$66
S Tax Year 2010 Payments:	-	\$31	-	-	-	-	-	-	-	-	\$31
S Allocated Tips:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Capital Gains:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Dividends:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S IRA Contributions:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Mortgage Interest Paid:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Nonemployee Compensation :	-	-	-	-	-	-	-	\$0	\$0	-	\$0
S Non-employee Compensation:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Points Paid:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Real Estate Sales:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0
S Savings Bonds:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	\$0

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INCOME DOCUMENTS

**		2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Totals
T	Transcript Date:	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	
T	W-2	1	1	0	0	0	0	0	0	0	0	2
T	1098	0	0	0	0	0	0	0	0	0	0	0
T	1098-C	0	0	0	0	0	0	0	0	0	0	0
T	1098-E	0	0	0	0	0	0	0	0	0	0	0
T	1098-T	0	0	0	0	0	0	0	0	0	0	0
T	5498	0	0	0	0	0	0	0	0	0	0	0
T	5498 SA	0	0	0	0	0	0	0	0	0	0	0
T	1099-A	0	0	0	0	0	0	0	0	0	0	0
T	1099-B	0	0	0	0	0	0	0	0	0	0	0
T	1099-C	0	0	0	0	0	0	0	0	0	0	0
T	1099-CAP	0	0	0	0	0	0	0	0	0	0	0
T	1099-DIV	0	0	0	0	0	0	0	0	0	0	0
T	1099-G	0	0	0	0	0	0	0	0	0	0	0
T	1099-H	0	0	0	0	0	0	0	0	0	0	0
T	1099-INT	0	0	0	0	0	0	0	1	0	0	1
T	1099-K	0	0	0	0	0	1	1	0	0	0	2
T	1099-LTC	0	0	0	0	0	0	0	0	0	0	0
T	1099-MISC	1	1	1	1	1	2	0	0	0	0	7
T	1099-OID	0	0	0	0	0	0	0	0	0	0	0
T	1099-PATR	0	0	0	0	0	0	0	0	0	0	0
T	1099-Q	0	0	0	0	0	0	0	0	0	0	0
T	1099-R	0	0	0	0	0	0	0	0	0	0	0
T	1099-S	0	0	0	0	0	0	0	0	0	0	0
T	1099-SA	0	0	0	0	0	0	0	0	0	0	0
T	1042-S	0	0	0	0	0	0	0	0	0	0	0
T	SSA-1099	0	0	0	0	0	1	1	1	1	0	4
T	SSA-1042S	0	0	0	0	0	0	0	0	0	0	0
T	RRB-1099	0	0	0	0	0	0	0	0	0	0	0
T	RRB-1099R	0	0	0	0	0	0	0	0	0	0	0
T	RRB-1042S	0	0	0	0	0	0	0	0	0	0	0
T	W-2G	0	0	0	0	0	0	0	0	0	0	0
T	K-1 1041	0	0	0	0	0	0	0	0	0	0	0
T	K-1 1065	0	0	0	0	0	0	0	0	0	0	0
T	K-1 1120s	0	0	0	0	0	0	0	0	0	0	0
T	W-4	0	0	0	0	0	0	0	0	0	0	0
T	3921	0	0	0	0	0	0	0	0	0	0	0
T	3922	0	0	0	0	0	0	0	0	0	0	0
T	8805	0	0	0	0	0	0	0	0	0	0	0

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 B = Both

INCOME DOCUMENTS (cont.)

**		2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	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	
T	1097-BTC											
T	1098-Q	0	0	0	0	0	0	0	0	0	0	0
T	1099-LS	0	0	0	0	0	0	0	0	0	0	0
T	1099-MSA	0	0	0	0	0	0	0	0	0	0	0
T	1099-SB	0	0	0	0	0	0	0	0	0	0	0
T	5498-ESA	0	0	0	0	0	0	0	0	0	0	0
T	5498-MSA	0	0	0	0	0	0	0	0	0	0	0
T	1099-NEC	0	0	0	0	0	0	0	0	0	0	0
T	TOTAL	<b>2</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>4</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>16</b>

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INCOME DOCUMENTS (cont.)

**		2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Totals
S	Transcript Date:	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	1/18/2023	
S	W-2	1	1	1	1	2	3	3	1	2	0	15
S	1098	0	0	0	0	0	0	0	0	0	0	0
S	1098-C	0	0	0	0	0	0	0	0	0	0	0
S	1098-E	0	0	0	0	0	0	0	0	0	0	0
S	1098-T	0	0	0	0	0	0	0	0	0	0	0
S	5498	0	0	0	0	0	0	0	0	0	0	0
S	5498 SA	0	0	0	0	0	0	1	1	1	0	3
S	1099-A	0	0	0	0	0	0	0	0	0	0	0
S	1099-B	0	0	0	0	0	0	0	0	0	0	0
S	1099-C	0	0	0	0	0	0	0	0	0	0	0
S	1099-CAP	0	0	0	0	0	0	0	0	0	0	0
S	1099-DIV	0	0	0	0	0	0	0	0	0	0	0
S	1099-G	0	0	0	0	1	1	0	1	1	0	4
S	1099-H	0	0	0	0	0	0	0	0	0	0	0
S	1099-INT	1	1	1	1	1	0	0	0	0	0	5
S	1099-K	0	0	0	0	0	0	0	0	0	0	0
S	1099-LTC	0	0	0	0	0	0	0	0	0	0	0
S	1099-MISC	0	0	0	0	0	0	0	0	0	0	0
S	1099-OID	0	0	0	0	0	0	0	0	0	0	0
S	1099-PATR	0	0	0	0	0	0	0	0	0	0	0
S	1099-Q	0	0	0	0	0	0	0	0	0	0	0
S	1099-R	0	0	0	0	1	0	1	1	2	0	5
S	1099-S	0	0	0	0	0	0	0	0	0	0	0
S	1099-SA	0	0	0	0	0	0	0	1	1	0	2
S	1042-S	0	0	0	0	0	0	0	0	0	0	0
S	SSA-1099	1	1	1	1	1	1	1	1	1	0	9
S	SSA-1042S	0	0	0	0	0	0	0	0	0	0	0
S	RRB-1099	0	0	0	0	0	0	0	0	0	0	0
S	RRB-1099R	0	0	0	0	0	0	0	0	0	0	0
S	RRB-1042S	0	0	0	0	0	0	0	0	0	0	0
S	W-2G	0	0	0	0	0	0	0	0	0	0	0
S	K-1 1041	0	0	0	0	0	0	0	0	0	0	0
S	K-1 1065	0	0	0	0	0	0	0	0	0	0	0
S	K-1 1120s	0	0	0	0	0	0	0	0	0	0	0
S	W-4	0	0	0	0	0	0	0	0	0	0	0
S	3921	0	0	0	0	0	0	0	0	0	0	0
S	3922	0	0	0	0	0	0	0	0	0	0	0
S	8805	0	0	0	0	0	0	0	0	0	0	0

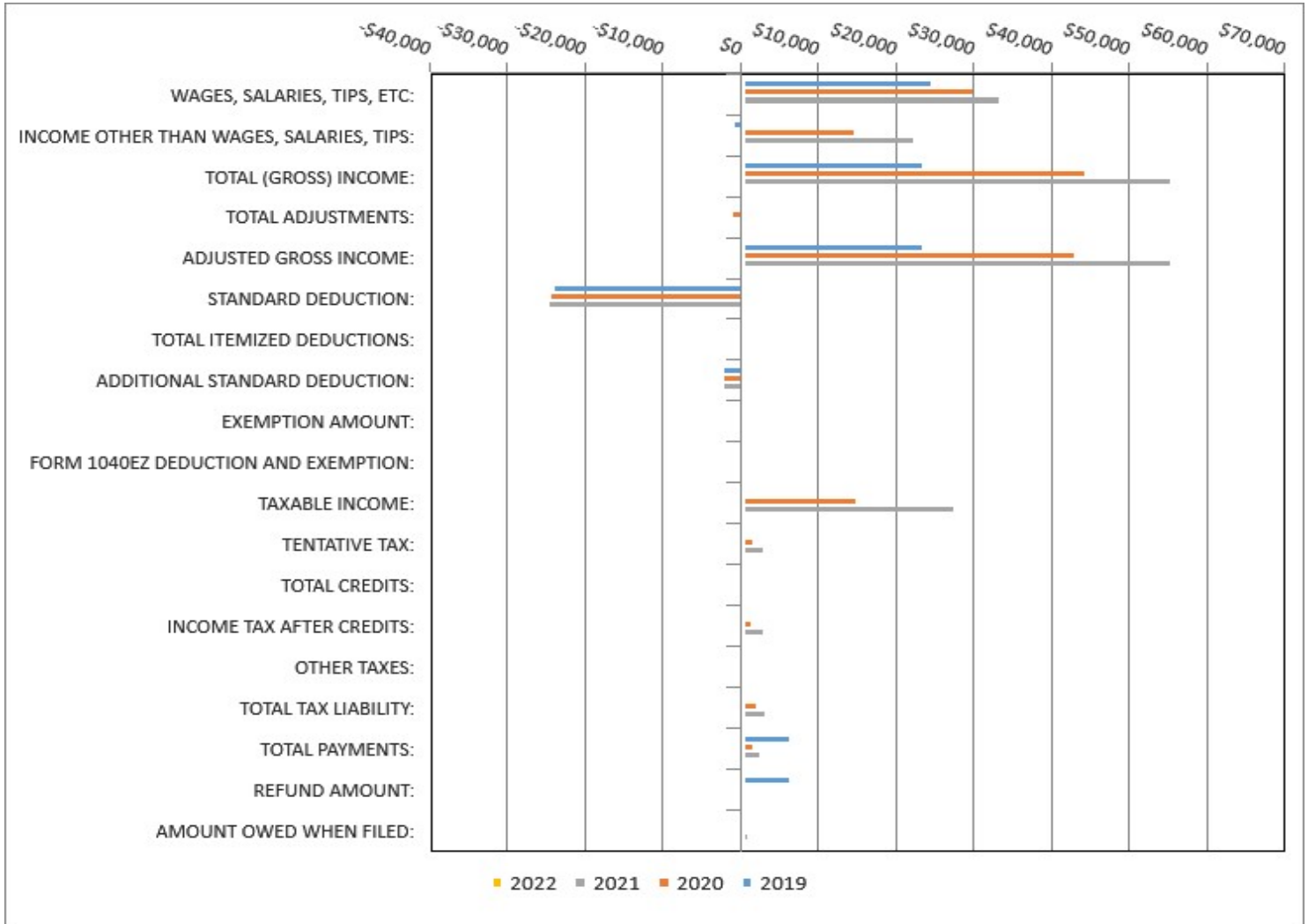
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INCOME DOCUMENTS (cont.)

**		2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	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	
S	1097-BTC											
S	1098-Q	0	0	0	0	0	0	0	0	0	0	0
S	1099-LS	0	0	0	0	0	0	0	0	0	0	0
S	1099-MSA	0	0	0	0	0	0	0	0	0	0	0
S	1099-SB	0	0	0	0	0	0	0	0	0	0	0
S	5498-ESA	0	0	0	0	0	0	0	0	0	0	0
S	5498-MSA	0	0	0	0	0	0	0	0	0	0	0
S	1099-NEC	0	0	0	0	0	0	0	0	0	0	0
S	TOTAL	<b>3</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>6</b>	<b>5</b>	<b>6</b>	<b>6</b>	<b>8</b>	<b>0</b>	<b>43</b>

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TAX RETURN OVERVIEW



TAX SUMMARY	2019	2020	2021	2022
RETURN TRANSCRIPT DATE	not found	1/18/2023	1/18/2023	1/18/2023
TAX RETURN FILED:	Original	Original	Original	-
TYPE OF RETURN:	1040	1040	1040	1040
WAGES, SALARIES, TIPS, ETC:	\$24,440	\$29,730	\$33,221	-
INCOME OTHER THAN WAGES, SALARIES, TIPS:	(\$1,307)	\$14,512	\$22,050	-
TOTAL (GROSS) INCOME:	\$23,133	\$44,242	\$55,271	-
TOTAL ADJUSTMENTS:	\$0	(\$1,461)	(\$46)	-
ADJUSTED GROSS INCOME:	\$23,133	\$42,781	\$55,225	-
STANDARD DEDUCTION:	(\$24,400)	(\$24,800)	(\$25,100)	-
TOTAL ITEMIZED DEDUCTIONS:	-	-	-	-
ADDITIONAL STANDARD DEDUCTION:	(\$2,600)	(\$2,600)	(\$2,700)	-
EXEMPTION AMOUNT:	\$0	\$0	\$0	-
FORM 1040EZ DEDUCTION AND EXEMPTION:	-	-	-	-
TAXABLE INCOME:	\$0	\$14,697	\$27,304	-
TENTATIVE TAX:	\$0	\$1,468	\$2,881	-
TOTAL CREDITS:	\$0	(\$200)	\$0	-
INCOME TAX AFTER CREDITS:	\$0	\$1,268	\$2,881	-
OTHER TAXES:	\$0	\$521	\$91	-
TOTAL TAX LIABILITY:	\$0	\$1,789	\$2,972	-
TOTAL PAYMENTS:	\$6,115	\$1,465	\$2,326	-
REFUND AMOUNT:	\$6,115	-	-	-
AMOUNT OWED WHEN FILED:	-	\$324	\$646	-

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		2021 Accrued Interest			\$14.30		8/6/2032			116	\$0.17	\$0.24	\$0.22
B			2021 Accrued Penalty			\$0.00		8/6/2032			-	\$0.00		
B			2021 Reversed Credits/Other			\$0.00		8/6/2032			-	\$0.00		
B			2021 Total IA Payments									\$4.68		
B		150	Tax return filed	6/6/2022	\$2,972.00	\$376.00	60	8/6/2032	uk		116	\$4.47	\$6.41	\$5.68
B		196	Interest charged for late payment	6/6/2022	\$3.38	\$3.38		8/6/2032	uk		116	\$0.04	\$0.06	\$0.05
	2020		2020 Accrued Interest			\$0.00		6/15/2031			-	\$0.00		
B			2020 Accrued Penalty			\$0.00		6/15/2031			-	\$0.00		
B			2020 Reversed Credits/Other			\$0.00		6/15/2031			-	\$0.00		
B			2020 Total IA Payments									\$0.00		
B		150	Tax return filed	6/14/2021	\$1,789.00	\$0.00		6/15/2031	uk		-	\$0.00		
	2018		2018 Accrued Interest			\$0.00		9/10/2029			-	\$0.00		
B			2018 Accrued Penalty			\$0.00		9/10/2029			-	\$0.00		
B			2018 Reversed Credits/Other			\$0.00		9/10/2029			-	\$0.00		
B			2018 Total IA Payments									\$0.00		
B		150	Tax return filed	9/9/2019	\$184.00	\$0.00		9/10/2029	uk		-	\$0.00		
	2017		2017 Accrued Interest			\$660.57		11/10/2031			107	\$8.32	\$11.27	\$9.98
B			2017 Accrued Penalty			\$1,179.98		11/10/2031			107	\$14.87	\$20.13	\$17.82
B			2017 Reversed Credits/Other			\$0.00		11/10/2031			-	\$0.00		
B			2017 Total IA Payments									\$159.07		
B		150	Tax return filed	6/25/2018	\$2,283.00	\$0.00	78	9/12/2028	uk		-	\$0.00		
B		160	Penalty for filing tax return after the	8/23/2021	\$547.60	\$547.60	78	11/10/2031	11/9/2031	0	107	\$6.90	\$9.34	\$8.27
B		240	Miscellaneous penalty	8/23/2021	\$1,480.60	\$1,480.60	78	11/10/2031	11/9/2031	0	107	\$18.66	\$25.26	\$22.36
B		300	Additional tax assessed by examination	8/23/2021	\$7,403.00	\$7,253.00	78	11/10/2031	11/9/2031	0	107	\$91.39	\$123.73	\$109.54
B		336	Interest charged for late payment	8/23/2021	\$1,502.72	\$1,502.72		11/10/2031	11/9/2031	0	107	\$18.93	\$25.63	\$22.69
	2016		2016 Accrued Interest			\$0.00		7/18/2027			-	\$0.00		
B			2016 Accrued Penalty			\$0.00		7/18/2027			-	\$0.00		
B			2016 Reversed Credits/Other			\$0.00		7/18/2027			-	\$0.00		
B			2016 Total IA Payments									\$0.00		
B		150	Tax return filed	7/17/2017	\$6,798.00	\$0.00		7/18/2027	7/17/2027	0	-	\$0.00		
B		170	Penalty for not pre-paying tax	7/17/2017	\$12.00	\$0.00		7/18/2027	7/17/2027	0	-	\$0.00		
	2015		2015 Accrued Interest			\$0.00		7/26/2026			-	\$0.00		
B			2015 Accrued Penalty			\$0.00		7/26/2026			-	\$0.00		
B			2015 Reversed Credits/Other			\$0.00		7/26/2026			-	\$0.00		
B			2015 Total IA Payments									\$0.00		
B		150	Tax return filed	7/25/2016	\$6,722.00	\$0.00		7/26/2026	uk		-	\$0.00		
	2014		2014 Accrued Interest			\$0.00		7/7/2025			-	\$0.00		
T			2014 Accrued Penalty			\$0.00		7/7/2025			-	\$0.00		

\*\*T = Taxpayer  
S = Spouse  
B = Both

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)**
	2014		2014 Reversed Credits/Other			\$0.00		7/7/2025			-	\$0.00		
T			2014 Total IA Payments									\$0.00		
T		150	Tax return filed	7/6/2015	\$9,581.00	\$0.00		7/7/2025	uk		-	\$0.00		
	2013		2013 Accrued Interest			\$0.00		7/8/2024			-	\$0.00		
B			2013 Accrued Penalty			\$0.00		7/8/2024			-	\$0.00		
B			2013 Reversed Credits/Other			\$0.00		7/8/2024			-	\$0.00		
B			2013 Total IA Payments									\$0.00		
B		150	Tax return filed	7/7/2014	\$6,829.00	\$0.00		7/8/2024	uk		-	\$0.00		
	2012		2012 Accrued Interest			\$0.00		7/2/2023			-	\$0.00		
B			2012 Accrued Penalty			\$0.00		7/2/2023			-	\$0.00		
B			2012 Reversed Credits/Other			\$0.00		7/2/2023			-	\$0.00		
B			2012 Total IA Payments									\$0.00		
B		150	Tax return filed	7/1/2013	\$5,677.00	\$0.00		7/2/2023	uk		-	\$0.00		
	2011		2011 Accrued Interest			\$0.00		4/24/2022			-	\$0.00		
B			2011 Accrued Penalty			\$0.00		4/24/2022			-	\$0.00		
B			2011 Reversed Credits/Other			\$0.00		4/24/2022			-	\$0.00		
B			2011 Total IA Payments									\$0.00		
B		150	Tax return filed	4/23/2012	\$5,266.00	\$0.00		4/24/2022	uk		-	\$0.00		
	2010		2010 Accrued Interest			\$0.00		5/3/2021			-	\$0.00		
B			2010 Accrued Penalty			\$0.00		5/3/2021			-	\$0.00		
B			2010 Reversed Credits/Other			\$0.00		5/3/2021			-	\$0.00		
B			2010 Total IA Payments									\$0.00		
B		150	Tax return filed	5/2/2011	\$5,715.00	\$0.00		5/3/2021	uk		-	\$0.00		

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CSED TOLLING CALCULATIONS

**	Year	Code	Explanation of Transaction	Start Date	End Date	End Code	Tolling Days	Additional Tolling Days	Total Days
	2021								
B		971	Pending installment agreement	4/28/2022	8/5/2022	971	99	0	99
	2020								
B			No Tolling Events Found						
	2019								
B			No Tolling Events Found						
	2018								
B			No Tolling Events Found						
	2017								
B		971	Pending installment agreement	5/19/2022	8/5/2022	971	78	0	78
	2016								
B			No Tolling Events Found						
	2015								
B			No Tolling Events Found						
	2014								
B			No Tolling Events Found						
	2013								
B			No Tolling Events Found						
	2012								
B			No Tolling Events Found						
	2011								
B			No Tolling Events Found						
	2010								
B			No Tolling Events Found						

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? = 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			
B		CP 0014	Notice issued	6/6/2022
B			Notice issued NOTICE1444	4/1/2021
	2020			
B			Notice issued NOTICE1444	4/27/2020
	2017			
B			Collection due process Notice of Intent to Levy -- issued	2/14/2022
B			Final notice before levy on social security benefits	4/25/2022
B		CP 0022	Notice issued	8/23/2021
B		CP 0090	Notice issued	2/14/2022
B		CP 0091	Notice issued	4/25/2022
	2011			
B		CP 0049	Notice issued	4/23/2012
	2010			
B		CP 0049	Notice issued	5/2/2011

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## 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.
CP22	If you received an IRS CP22 Notice, the IRS made the change(s) you requested to your tax return and you own money on your taxes as a result of the change(s).
CP49	If you received an IRS CP49 Notice, the IRS used all or part of your refund to pay a tax debt.
CP90	We are notifying you of our intent to levy certain assets for unpaid taxes. You have the right to a Collection Due Process hearing.
CP91	We are notifying you of our intent to levy up to 15% of your social security benefits for unpaid taxes.

IRS ACCOUNT SUMMARY

**	Tax Year	Code	Explanation of Transaction	Date	Amount
	2023				
B			No Account Transcript Found		
	2022				
B			No Account Transcript Found		
	2021				
B		846	Refund issued	3/17/2021	\$5,600
B		290	Additional tax assessed 00-00-0000	3/29/2021	\$0
B		766	Credit to your account	3/29/2021	(\$2,800)
B		766	Tax relief credit	3/29/2021	(\$2,800)
B		971	Notice issued NOTICE1444	4/1/2021	\$0
B		290	Additional tax assessed 00-00-0000	6/21/2021	\$0
B		460	Extension of time to file tax return ext. Date 10-15-2022	4/14/2022	\$0
B		806	W-2 or 1099 withholding	4/15/2022	(\$2,326)
B		670	Payment	4/20/2022	(\$55)
B		971	Pending installment agreement	4/28/2022	\$0
B		666	Estimated tax transferred in	5/9/2022	(\$55)
B		150	Tax return filed	6/6/2022	\$2,972
B		196	Interest charged for late payment	6/6/2022	\$3
B		971	Notice issued CP 0014	6/6/2022	\$0
B		666	Estimated tax transferred in	7/21/2022	(\$110)
B		971	Installment agreement established	8/5/2022	\$0
B		960	Appointed representative	8/11/2022	\$0
B		666	Estimated tax transferred in	10/20/2022	(\$50)
	2020				
B		846	Refund issued	4/15/2020	\$2,400
B		290	Additional tax assessed 00-00-0000	4/27/2020	\$0
B		766	Tax relief credit	4/27/2020	(\$2,400)
B		971	Notice issued NOTICE1444	4/27/2020	\$0
B		846	Refund issued	1/4/2021	\$1,800
B		290	Additional tax assessed 00-00-0000	1/18/2021	\$0
B		766	Credit to your account	1/18/2021	(\$600)
B		766	Tax relief credit	1/18/2021	(\$1,200)
B		806	W-2 or 1099 withholding	4/15/2021	(\$1,465)
B		610	Payment with return	5/19/2021	(\$324)
B		150	Tax return filed	6/14/2021	\$1,789
B		960	Appointed representative	8/11/2022	\$0
	2019				
B		766	Credit to your account	4/15/2020	(\$1,400)
B		768	Earned income credit	4/15/2020	(\$3,526)
B		806	W-2 or 1099 withholding	4/15/2020	(\$1,189)
B		846	Refund issued	10/28/2020	\$6,237
B		150	Tax return filed	11/9/2020	\$0
B		776	Interest credited to your account	11/9/2020	(\$122)
B		960	Appointed representative	8/11/2022	\$0
	2018				
B		806	W-2 or 1099 withholding	4/15/2019	(\$415)
B		846	Refund issued	8/28/2019	\$231
B		150	Tax return filed	9/9/2019	\$184
B		960	Appointed representative	8/11/2022	\$0
	2017				
B		806	W-2 or 1099 withholding	4/15/2018	(\$4,210)

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IRS ACCOUNT SUMMARY (cont.)

**	Tax Year	Code	Explanation of Transaction	Date	Amount
	2017				
B		846	Refund issued	6/13/2018	\$1,927
B		150	Tax return filed	6/25/2018	\$2,283
B		420	Examination of tax return	8/30/2019	\$0
B		160	Penalty for filing tax return after the due date 11-09-2031	8/23/2021	\$548
B		240	Miscellaneous penalty 11-09-2031	8/23/2021	\$1,481
B		300	Additional tax assessed by examination 11-09-2031	8/23/2021	\$7,403
B		336	Interest charged for late payment	8/23/2021	\$1,503
B		421	Closed examination of tax return	8/23/2021	\$0
B		971	Notice issued CP 0022	8/23/2021	\$0
B		971	Tax period blocked from automated levy program	12/13/2021	\$0
B		971	Account match for federal levy payment program	2/14/2022	\$0
B		971	Collection due process Notice of Intent to Levy -- issued	2/14/2022	\$0
B		971	Notice issued CP 0090	2/14/2022	\$0
B		971	First Levy Issued on Module	4/11/2022	\$0
B		971	Final notice before levy on social security benefits	4/25/2022	\$0
B		971	Notice issued CP 0091	4/25/2022	\$0
B		971	Pending installment agreement	5/19/2022	\$0
B		971	Installment agreement established	8/5/2022	\$0
B		960	Appointed representative	8/11/2022	\$0
B		666	Estimated tax transferred in	9/22/2022	(\$50)
B		666	Estimated tax transferred in	10/20/2022	(\$50)
B		670	Payment	11/28/2022	(\$50)
	2016				
B		806	W-2 or 1099 withholding	4/15/2017	(\$5,666)
B		610	Payment with return	4/21/2017	(\$1,144)
B		150	Tax return filed	7/17/2017	\$6,798
B		170	Penalty for not pre-paying tax 07-17-2027	7/17/2017	\$12
	2015				
B		806	W-2 or 1099 withholding	4/15/2016	(\$5,739)
B		610	Payment with return	4/21/2016	(\$983)
B		150	Tax return filed	7/25/2016	\$6,722
	2014				
T		610	Payment with return	4/4/2015	(\$2,377)
T		806	W-2 or 1099 withholding	4/15/2015	(\$7,204)
T		150	Tax return filed	7/6/2015	\$9,581
S			No tax return filed		
S		594	Tax return previously filed	7/6/2015	\$0
	2013				
B		806	W-2 or 1099 withholding	4/15/2014	(\$6,432)
B		610	Payment with return	4/18/2014	(\$397)
B		150	Tax return filed	7/7/2014	\$6,829
	2012				
B		806	W-2 or 1099 withholding	4/15/2013	(\$5,077)
B		610	Payment with return	4/16/2013	(\$600)
B		150	Tax return filed	7/1/2013	\$5,677
	2011				
B		430	Estimated tax payment	6/27/2011	(\$671)
B		806	W-2 or 1099 withholding	4/15/2012	(\$5,127)
B		826	Credit transferred out to 1040 200112	4/15/2012	\$251
B		826	Credit transferred out to 1040 200212	4/15/2012	\$952

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IRS ACCOUNT SUMMARY (cont.)

**	Tax Year	Code	Explanation of Transaction	Date	Amount
	2011				
B		150	Tax return filed	4/23/2012	\$5,266
B		971	Notice issued CP 0049	4/23/2012	\$0
	2010				
B		430	Estimated tax payment	5/6/2010	(\$671)
B		430	Estimated tax payment	8/2/2010	(\$671)
B		430	Estimated tax payment	1/3/2011	(\$671)
B		430	Estimated tax payment	1/21/2011	(\$671)
B		766	Credit to your account	4/15/2011	(\$800)
B		806	W-2 or 1099 withholding	4/15/2011	(\$4,432)
B		826	Credit transferred out to 1040 200112	4/15/2011	\$2,201
B		150	Tax return filed	5/2/2011	\$5,715
B		971	Notice issued CP 0049	5/2/2011	\$0

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PAYMENT, CREDIT, ABATEMENT HISTORY\*

**	Tax Year	Code	Explanation of Transaction	Date	Amount
	2021				
B		766	Credit to your account	3/29/2021	-2800
B		766	Tax relief credit	3/29/2021	-2800
B		806	W-2 or 1099 withholding	4/15/2022	-2326
B		670	Payment	4/20/2022	-55
B		666	Estimated tax transferred in	5/9/2022	-55
B		666	Estimated tax transferred in	7/21/2022	-110
B		666	Estimated tax transferred in	10/20/2022	-50
	2020				
B		766	Tax relief credit	4/27/2020	-2400
B		766	Credit to your account	1/18/2021	-600
B		766	Tax relief credit	1/18/2021	-1200
B		806	W-2 or 1099 withholding	4/15/2021	-1465
B		610	Payment with return	5/19/2021	-324
	2019				
B		766	Credit to your account	4/15/2020	-1400
B		768	Earned income credit	4/15/2020	-3526
B		806	W-2 or 1099 withholding	4/15/2020	-1189
B		776	Interest credited to your account	11/9/2020	-121.82
	2018				
B		806	W-2 or 1099 withholding	4/15/2019	-415
	2017				
B		806	W-2 or 1099 withholding	4/15/2018	-4210
B		666	Estimated tax transferred in	9/22/2022	-50
B		666	Estimated tax transferred in	10/20/2022	-50
B		670	Payment	11/28/2022	-50
	2016				
B		806	W-2 or 1099 withholding	4/15/2017	-5666
B		610	Payment with return	4/21/2017	-1144
	2015				
B		806	W-2 or 1099 withholding	4/15/2016	-5739
B		610	Payment with return	4/21/2016	-983
	2014				
T		610	Payment with return	4/4/2015	-2377
T		806	W-2 or 1099 withholding	4/15/2015	-7204
	2013				
B		806	W-2 or 1099 withholding	4/15/2014	-6432
B		610	Payment with return	4/18/2014	-397
	2012				
B		806	W-2 or 1099 withholding	4/15/2013	-5077
B		610	Payment with return	4/16/2013	-600
	2011				
B		430	Estimated tax payment	6/27/2011	-671
B		806	W-2 or 1099 withholding	4/15/2012	-5127

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\*Does not include Civil Penalty amounts

PAYMENT, CREDIT, ABATEMENT HISTORY\* (cont.)

**	Tax Year	Code	Explanation of Transaction	Date	Amount
	2010				
B		430	Estimated tax payment	5/6/2010	-671
B		430	Estimated tax payment	8/2/2010	-671
B		430	Estimated tax payment	1/3/2011	-671
B		430	Estimated tax payment	1/21/2011	-671
B		766	Credit to your account	4/15/2011	-800
B		806	W-2 or 1099 withholding	4/15/2011	-4432

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\*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
B	2023	-						-	-	-	\$0.00	-
B	2022	-						-	-	-	\$0.00	-
B	2021	Original						\$0.00	\$0.00	\$14.30	\$3.38	\$17.68
B	2020	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2019	Original						\$0.00	\$0.00	\$0.00	(\$121.82)	(\$121.82)
B	2018	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2017	Original	Y		\$547.60		\$1,480.60	\$1,179.98	\$3,208.18	\$660.57	\$1,502.72	\$2,163.29
B	2016	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2015	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2014	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2014	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2013	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2012	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2011	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B	2010	Original						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Totals			\$547.60	\$0.00	\$1,480.60	\$1,179.98	\$3,208.18	\$674.87	\$1,384.28	\$2,059.15

\*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).

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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)*
B	2023	-							
B	2022	-							
B	2021	Original	4/15/2022	10/15/2022	10/15/2025	10/15/2025	10/15/2025	\$2,596.00	\$2,596.00
B	2020	Original	5/16/2021	5/17/2021	5/17/2024	5/17/2024	5/17/2024	\$1,789.00	\$1,789.00
B	2019	Original	7/8/2020	7/15/2020	7/15/2023	7/15/2023	7/15/2023	\$0.00	\$0.00
B	2018	Original	8/6/2019	4/15/2019	8/6/2022	4/15/2022	8/6/2022	expired	\$0.00
B	2017	Original	5/21/2018	4/15/2018	5/21/2021	4/15/2021	5/21/2021	expired	\$150.00
B	2016	Original	4/15/2017	4/15/2017	4/15/2020	4/15/2020	4/15/2020	expired	\$0.00
B	2015	Original	4/15/2016	4/15/2016	4/15/2019	4/15/2019	4/15/2019	expired	\$0.00
T	2014	Original	4/15/2015	4/15/2015	4/15/2018	4/15/2018	4/15/2018	expired	\$0.00
S	2014	No	none	4/15/2015	open	4/15/2018	not filed	expired	\$0.00
B	2013	Original	4/15/2014	4/15/2014	4/15/2017	4/15/2017	4/15/2017	expired	\$0.00
B	2012	Original	4/15/2013	4/15/2013	4/15/2016	4/15/2016	4/15/2016	expired	\$0.00
B	2011	Original	4/15/2012	4/15/2012	4/15/2015	4/15/2015	4/15/2015	expired	\$0.00
B	2010	Original	4/15/2011	4/15/2011	4/15/2014	4/15/2014	4/15/2014	expired	\$0.00

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\*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*
B	2023	-	-						\$0.00	\$0.00	\$0.00
B	2022	-	-						\$0.00	\$0.00	\$0.00
B	2021	\$393.68	Original	none	none	No	Installment agreement established	8/5/2022	\$4.68	\$6.71	\$5.95
B	2020	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2019	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2018	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2017	\$12,624.47	Original	none	2/14/2022	No	Installment agreement established	8/5/2022	\$159.07	\$215.36	\$190.66
B	2016	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2015	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
T	2014	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
S	2014	\$0.00	No	none	none				\$0.00	\$0.00	\$0.00
B	2013	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2012	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2011	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
B	2010	\$0.00	Original	none	none				\$0.00	\$0.00	\$0.00
							Total Estimated IA Payment (Does Not Include SRP)*		\$163.75	\$222.07	\$196.61

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\*Includes IRS daily accrued interest of 7% APR.