

Scenario Title

Allocation

Scenario Description:

The KBB value of the vehicle and the Zillow estimate from the primary home are attached to this scenario.

TP student loan balance is \$101,500 and the final payoff date is 1-8-2030. Monthly payment is \$1,283.

The wife's income is not included on the scenario spreadsheet but the TP provided her 2020 W-2. She does not want to provide any other information.

Additional Tax Debt Info

See THS Dashboard attached to scenario.

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	-	Uk					-	-	not found
2020	Original	MFS	10/15/2021				\$0.00	\$0.00	12/21/2021
2019	Original	MFS	10/15/2020				\$0.00	\$0.00	12/21/2021
2018	Original	MFS	10/15/2019		No		\$17,811.73	\$20,805.06	12/21/2021
2017	Original	MFS	10/15/2018		No		\$10,621.74	\$13,874.59	12/21/2021
2016	Original	S	10/15/2017	3/16/2018	1/5/2022	Closed#	\$40,016.37	\$55,322.07	12/21/2021
2015	Original	S	10/15/2016	3/16/2018	1/5/2022	Closed#	\$45,630.91	\$64,215.56	12/21/2021
2014	Original	S	10/15/2015	3/16/2018	1/5/2022	Closed#	\$21,611.54	\$33,726.07	12/21/2021
2013	Original	S	10/15/2014	Removed		Closed#	\$0.00	\$0.05	12/21/2021
2012	Original	S		Removed			\$0.00	\$0.00	12/21/2021
2011	Original	S		Removed		Closed#	\$0.00	\$0.01	12/21/2021
2010	Original	S					\$0.00	\$0.00	12/21/2021
2009	Original	S					\$0.00	\$0.00	12/21/2021
2008	Original	S					\$0.00	\$0.00	12/21/2021
2007	Original	S		Removed			\$0.00	\$3.13	12/21/2021
2006	Original	S					\$0.00	\$0.00	12/21/2021
2005	Original	S					\$0.00	\$0.00	12/21/2021
2004	Original	S					\$0.00	\$0.00	12/21/2021
2003	Original	S	10/15/2004				\$0.00	\$0.00	12/21/2021
2002	Original	S	10/15/2003				\$0.00	\$0.00	12/21/2021
2001	Original	S	10/15/2002				\$0.00	\$0.00	12/21/2021
2000	Original	S	10/15/2001				\$0.00	\$0.00	12/21/2021
1999	Original	S	10/15/2000				\$0.00	\$0.00	4/20/2021
1998	Original	Uk	10/15/1999				\$0.00	\$0.00	4/20/2021
1997	-	Uk					-	-	not found
1996	-	Uk					-	-	not found
1995	-	Uk					-	-	not found
1994	-	Uk					-	-	not found
1993	-	Uk					-	-	not found
1992	-	Uk					-	-	not found
1991	-	Uk					-	-	not found
1990	-	Uk					-	-	not found
						Total**	\$135,692.29	\$187,946.54	

*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

Taxpayer(s) Personal Info

	Primary	Spouse	
First Name	Brian	Daisy	
Last Name	Taylor	Taylor	
SSN	707-00-8679	552-00-3707	
Date of Birth	4/27/1967	10/9/1971	
Age	55	51	
DL #	708492036	538089779	
Marital Status	MFS	Marriage Date	6/2/2017
Phone	(214)555-1408		
Street Address	8721 Flint Falls Dr		
City	Dallas		
State	TX		
State (Full)	Texas		
Zip	75243		
County	Dallas		
Number of Dependents	2		
Number of Cohabitants	0		

Dependents

	1	2	3
First Name	Bruce	Gloria	
Last Name	Taylor	Taylor	
DOB	4/25/2005	11/26/2008	
Age	17	14	
Monthly Income	0	0	

Cohabitant

	1	2	3
First Name			
Last Name			
Age			
Monthly Income			

Wages				
TP/SP	Employer Name	Occupation	Time Employed	Pay Cycle
Primary	Homer Gas and Oil	Engineer	15 years	Bi-Weekly
8727 6th Way, Cullen, LA 71021				
Annual Pay For Reference	Gross Paycheck Wages	Health Ins	Retirement	Net PreTax Wages
\$173,727	\$6,682			\$6,682
FICA Medicare	FICA Social Security	Federal WH	State WH	Net Pay
\$97	\$328	\$1,031		\$5,226
TP/SP	Employer Name	Occupation	Time Employed	Pay Cycle
Annual Pay For Reference	Gross Paycheck Wages	Health Ins	Retirement	Net PreTax Wages
		\$0		
FICA Medicare	FICA Social Security	Federal WH	State WH	Net Pay
TP/SP	Employer Name	Occupation	Time Employed	Pay Cycle
Annual Pay For Reference	Gross Paycheck Wages	Health Ins	Retirement	Net PreTax Wages
				\$0
FICA Medicare	FICA Social Security	Federal WH	State WH	Net Pay
\$0	\$0	\$0		\$0
TP/SP	Employer Name	Occupation	Time Employed	Pay Cycle
Annual Pay For Reference	Gross Paycheck Wages	Health Ins	Retirement	Net PreTax Wages
				\$0
FICA Medicare	FICA Social Security	Federal WH	State WH	Net Pay
\$0	\$0	\$0		\$0
OTHER INCOME				
	Taxpayer	Spouse	Total	
Description	Monthly			
Social Security			\$0	
SSA Withholding			\$0	
Pension			\$0	
Pension Withholding			\$0	
Unemployment			\$0	
UE Withholding			\$0	
Child support			\$0	
Alimony			\$0	
Net rental income			\$0	
Interest/dividends			\$0	
Other income			\$0	

EXPENSES					
Housing			Food Expenses		
	Actual			Actual	
Mortgage (Principal + Interest)	\$1,800	Food			
Taxes	\$420	Housekeeping supplies			
Insurance	\$280	Apparel & services			
Repairs/Maintenance		Personal care			
Rent		Miscellaneous			
Utilities		Medical Expenses (Monthly)			
Internet	\$100			Actual	
Cable	\$125	Copays			
Electric	\$375	Prescriptions			
Gas/heating oil		Other			
Home/cell phone	\$240	Health Insurance			
Trash/water	\$65	Health Insurance			\$864
		Dental Insurance			\$125
		Vision Insurance			\$50
		Other Insurance (LTD,STD,AD&D)			\$75
Loans					
Type	Secured	Start	End	Balance	Monthly Pmt principal + int
Mortgage	Primary Home	2/13/2015	2/13/2045	\$337,906	\$1,800
The Granville National Bank 328 South McCoy Street, Granville, IL 61326					
Car Loan	BMW	10/20/2020	9/20/2028	\$64,248	\$940
TexStar National Bank 600 Pat Booker Road, Universal City, TX 78148					
Credit Card/Available Credit					
Type	Bank	Account #	Credit Limit	Balance	Monthly Pmt
Visa	Capital One	370378491	\$12,000	\$4,200	\$35
100 E Pratt St, Baltimore, MD 21202					
AMEX	AMEX	529619744	\$10,000	\$0	\$0
11 High St, Des Moines, IA 50392					
General Expenses					
Description		Taxpayer	Spouse	Total	
Retirement Employer Required				\$0	
Voluntary Retirement				\$0	
Union Dues				\$0	
Student Loans		\$1,283		\$1,283	
Child Support		\$1,200		\$1,200	
Alimony				\$0	
Court Ordered Payments				\$0	
Estimated Tax Payments				\$0	
Child/Dependent Care				\$0	
Life Insurance		\$95		\$95	

ASSETS					
High Income, High Expenses & High Debt					
First Name	Account #	Amount			
Cash		\$12,000			
TP Checking	379800807	\$3,200			
Unity National Bank of Houston 2602 Blodgett Street, Houston, TX 77053					
TP Savings	962333631	\$15,000			
Unity National Bank of Houston 2602 Blodgett Street, Houston, TX 77053					
SP Checking					
SP Savings					
Investment Accounts					
Type	Account #	Basis Cost	Current Value		
TP IRA	872731376		\$40,000		
Charles Schwab P.O. Box 628291, Orlando, FL 32862 (800)555-9857					
SP IRA					
TP 401-K	65674494		\$65,000		
Charles Schwab P.O. Box 628291, Orlando, FL 32862 (800)555-9857					
SP 401-K					
TP Crypto					
SP Crypto					
TP Money Mkt					
Sp Money Mkt					
Assets					
Description		Purchased Date		Market Value	
Men's Rolex Submariner		3/29/2002		\$15,000	
Grand Piano		1/12/1995		\$7,500	
Boat		6/16/2019		\$35,000	
Property					
Type	Purchased Date	Purchase Price	Current Value	How Title Held	
Primary Home	2/13/2015	\$450,000		Lien	
8721 Flint Falls Dr, Dallas, TX 75243					

ASSETS**Vehicles**

TP or SP	Year	Make	Model	Tag	Mileage	Purchased Date	VIN
TP	2021	BMW	X5 S Drive 40i	PH654T	11,298	10/20/2020	5UXCR4C08M9F30046
SP	2019	VW	Jetta	EFD523	49,236	6/30/2021	3VWC57BU0KM052667

Vehicle/Transportation Expenses

	Actual
Insurance	400
Fuel	225
Maintenance/Other	25

Homer Gas and Oil

8727 6th Way
Cullen, LA 71021

Earnings Statement

Position: Engineer
Pay Period #: 9

Employee Name	Social Security	Employee ID	Check #	Pay Period Start	Pay Period End	Pay date
Brian Taylor	XXX-XX-8679	33594	26598	4/23/2022	5/6/2022	5/13/2022
Earnings	Rate	Hours	Current Gross	Deductions	Current	Year to Date

Regular Income			\$6,682.00	Federal Income Tax	\$1,031.00	\$9,279.00
				Social Security Tax	\$328.00	\$2,952.00
				Medicare	\$97.00	\$873.00

YTD Gross	YTD Deductions	YTD Net Pay	Current Gross Pay	Current Deductions	Net Pay
\$60,138.00	\$117,936.00	\$47,034.00	\$6,682.00	\$1,456.00	\$5,226.00

		a Employee's social security number		OMB No. 1545-0008			<input type="checkbox"/> CORRECTED (if checked)						
b Employer identification number (EIN)				1 Wages, tips, other compensation		2 Federal income tax withheld							
c Employer's name, address, and ZIP code				3 Social security wages		4 Social security tax withheld							
				5 Medicare wages and tips		6 Medicare tax withheld							
				7 Social security tips		8 Allocated tips							
d Control number				9 Verification code		10 Dependent care benefits							
e Employee's name f Employee's address and ZIP code				11 Nonqualified plans		12a C o d e							
				13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b C o d e							
				14 Other		12c C o d e							
						12d C o d e							
15 State		Employer's state ID number		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Information generated from Wage & Income Transcripts.
See attached transcript for verification. Note that not all information from the original form is provided on the transcripts.

***** Denotes fields where value is not available on IRS transcript



\$550,000 4 bd | 3 ba | 2,189 sqft

8721 Flint Falls Dr, Dallas, TX 75243

● **For sale** | Zestimate®: **\$584,200**

Est. payment: \$3,586/mo [Get pre-qualified](#)

We estimate this home will sell faster than 92% nearby.

[Contact Agent](#)

[Take a Tour](#)

[Overview](#) [Facts and features](#) [Home value](#) [Price and tax history](#) >



Get pre-qualified for a loan

Talking to a lender early to get pre-qualified for a mortgage can give you an advantage in a competitive market.

[Start now](#)

2019 Volkswagen Jetta 1.4T R-Line Sedan 4D

VIN: **3VWC57BU0KM052667** Mileage: **49,246** [Edit Options](#)

4.1 ★ (58 Ratings) [Write a review](#)



Recalls: **7 Recalls Found**
Is my car affected?



Repair Estimator: **See Pricing**
What's a fair price?



1 Compare Your Values

Use these values to help make a confident decision on whether to sell, trade or donate your car.

Instant Cash Offer

Trade-in

Private Party

Donate Your Car

Trade-in Range
\$17,710 - \$19,467
Trade-in Value
\$18,589



① Important info
& definitions

Condition:

Fair



Valid for ZIP Code **75243** through **05/12/2022**

Trade-In Value

This estimated value helps you
confidently negotiate with dealers.

Average Time to Trade-In:

1-7
DAYS

How Much to Expect:

\$\$\$

Level of Effort:



Medium

4.1 ★ (58 Ratings)

[Write a review](#)

 Recalls: 12 Recalls Found
Is my car affected? [→](#)

 Repair Estimator: See Pricing
What's a fair price? [→](#)

1

Compare Your Values

Use these values to help make a confident decision on whether to sell, trade or donate your car.

- Instant Cash Offer
- Trade-in
- Private Party
- Donate Your Car



Condition:

Fair 

Valid for ZIP Code 75243  through 05/12/2022 

4.5 ★ (26 Ratings)

[Write a review](#)

Trade-In Value

This estimated value helps you confidently negotiate with dealers.

Average Time to Trade-In:

1-7
DAYS


How Much to Expect:

\$\$\$

Level of Effort:



Texas



DL # 538089779

CLASS C

Daisy Taylor

8721 Flint Falls Dr
Dallas, TX 75243
Dallas County

Fake Driver's License

DOB 10/9/1971

EXP 06/21/2023

Restrictions A

Iss 06/21/2017

Sex: F

Hgt 5'-7"

Daisy Taylor

SOCIAL SECURITY

For Training Use Only

552-00-3707

THIS NUMBER HAS BEEN ESTABLISHED FOR

Daisy Taylor

Daisy Taylor

SIGNATURE

For Training Use Only

