#### **Resolution Readiness Report**

Tax Filing Compliance YES Active Audit or Exam NO Upcoming Appeal Deadline NO In Active Collections YES Assigned To Private Collections Agency NO Passport Certified For Revocation YES Penalty Abatement Opportunity NO Tax Lien Filed YES Estimated Monthly Payment \$22,846.54

Year	Return Filed	Filing Status	Lien Active		Collections Active	Exam/Audit Active	THS Calculated CSED	Last Activity	Last Activity Date	Total Balance
2025	No	НОН		none						(\$125,000.00)
2024	No	НОН		none						(\$150,000.00)
2023	Original	НОН		none			11/12/2034			\$0.00
2022	Original	НОН		none			11/7/2033			\$0.00
2021	Original	НОН		none			11/8/2032			\$8.64
2020	Original	НОН		none			11/9/2031			\$0.00
2019	Original	НОН		none			11/3/2030			\$0.00
2018	Original	S		none			11/5/2029			\$0.00
2017	Original	НОН		none			12/6/2028	No longer in installment agreement status	12/17/2018	\$0.00
2016	Original	НОН		none			11/14/2027			\$0.00
2015	Original	НОН		none			11/15/2026			\$0.00
2014	Original	НОН	12/25/2015	none	No		12/3/2025 to 3/18/2026	No longer in installment agreement status	2/11/2019	\$100,358.88
2013	Original	НОН	Removed	7/22/2015			12/25/2024 to 3/18/2026	No longer in installment agreement status	2/11/2019	\$0.00
2012	Original	НОН	Removed	7/22/2015			12/26/2023	No longer in installment agreement status	2/11/2019	\$0.00
2011	Original	НОН	Removed	7/22/2015			1/19/2023	No longer in installment agreement status	2/11/2019	\$0.00
2010	Original	MFS	Removed	7/22/2015			1/21/2022	No longer in installment agreement status	2/11/2019	\$0.00
2009	Original	MFS	Removed	7/22/2015	3/13/2019	Closed#	4/22/2021 to 5/12/2022	No longer in installment agreement status	2/11/2019	\$252,198.82
							TOTAL			\$352,566.34

\*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	YES	Missing Tax Returns

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

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 NO

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 theNFTL. An Equivalency Hearing can be elected by filing Form 12153 within one year, starting 5 business days after filing of the NFTL.

			A tour ou on in in	active callections when the IDC has made all require	al man   a. n. man #!#!a	otions and may love the					
			A taxpayer is in active collections when the IRS has met all required pre levy notifications and may levy the								
In Active Collection:	S	YES	taxpayer at any time without additional notification being legally required.								
			Congress require	Congress requires the IRS to hire Private Collection Agencies (PCA) to assist in collecting certain overdue tax							
				e CP40 issued by the IRS will contain details on the							
Assigned to Private Collectio	ns Agency			vill be needed to speak with the PCA.	J						
			The Fixing Amer	ica's Surface Transportation (FAST) Act requires th	ne IRS to certify s	eriously 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								
Passport Certified for Rev	ocation	YES	application is denied.								
			-								
Elligible for First Time Abatame	nt	NO									
Elligible for First Time Abatame	erit .	NO									
Tax Lien Filed YES Tax		Tax F	Periods 2014								
Streamline Installment Agr	roomont	NO		Non Streamline Installment Agreement	YES	\$22.846.54					
Streamine installment Agr	IVU		Non streamline installment Agreement	1E2	\$22,040.04						

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).



•	•					•					
Intake Notes	Taxpayer Income Trend? =										
	Is Taxpayer in	resolution? =									
	Current resol	ution monthly pa	ayment? =								
	433 prepared	433 prepared? =									
	MDI amount?	? =									
		Taxpayer maximum monthly payment? =									
		get monthly payn	nent? =								
		tate tax debt? =									
	Which states										
		nount owed? =									
	RO or RA Assi	~									
	Taxpayer hon										
	-	s: I'm not seekin	_	-	_						
	0 .	March 2017. IR									
	respond. IRS defaulted the agreement, but I had the TP continuous to the defaulted PPIA. IRS has been silent as we wa										
	pursuant to the defaulted PPIA. IRS has been silent as we wait out the CSED's. The only										
	remaining CSED is for 2014 (2009 has expired, it just hasn't made its way the system yet). TP recently received LTR16 which includes 2009 and 2014, but concerned about 2014. TP wants to renew his passport. I told him that it concerned about 2014.										
		to work through									
	· ·	_	•								
	runs in December 2025 for most of the 2014 balance. I think much of the interest and penalty will be written off in December as it pertains to the original debt. Is this correct? Also, neither the TP nor I know how the additional 2014 tax assessed in 2016 originated.										
		en I informed him of the timeline, he's inclined to wait it out until December 2025 and									
	pay whatever balance remains. Your thoughts, please.										
Collectability Opinion											
Criminal Evaluation		ce over \$100k bu	•	•		,					
Summary & Strategy	2009 has two CSED with significant variations between the THS calculations and the IRS										
, 0,		the IRS calculate									
	next year. It	is not uncommoi	n when there a	re two CSEDs to	see the IRS sys	tems unable					
	to write off th	next year. It is not uncommon when there are two CSEDs to see the IRS systems unable to write off the debt associated with the 1 <sup>st</sup> CSED.									
	Tax Period	Assessment	Tax	THS	IRS CSED	CSED					
		Date	Assessment	Calculation		variation					
						days					
	2009	11/22/2010	\$90,052.00	4/22/2021	4/30/2025	1,469					
	2009	3/12/2012	\$12,614.00	5/12/2022	4/8/2026	1,427					
		s likely the pendi	•	•							
	·	ossible a Revenu		-	•						
	•	nmediately clear	. Do you have	a plan to disput	e the IRS calcula	ated CSED or					
	wait until April of 2026?										
		Likewise, 2014 has two CSEDs, though without the massive discrepancy between IRS and									
	THS calculation	ons.									



Tax Period	Assessment	Tax	THS	IRS CSED	CSED
	Date	Assessment	Calculation		variation
					days
2014	11/2/2015	\$50,818.00	12/3/2025	12/2/2025	0
2014	2/15/2016	\$7,345.00	3/18/2026	3/17/2026	0

Penalties & interest generally do not carry their own CSED and will be subject to the assessment CSED. Unfortunately, the transcripts do not indicate the shares of penalty and interest allocated to each assessment making CSEDs tricky when there are multiple assessments.

The penalty & interest dashboard indicates \$60,514.39 in assessed & accrued penalty & interest. The  $1^{st}$  assessment with a CSED of 12/3/2025 represents about 87% of total tax so you could roughly calculate 87% of the penalties & interest will expire 12/3/2025. This is a rough estimate only.

Unclear what caused the additional assessment, with it happening so close on heels of the original return I wonder if it was akin to a math error notice. Maybe a duplicate or superseding return? Trying to unravel that would require a phone call to request a TXMODA and perhaps a FOIA, whether that is a good use of time (and fees) depends on taxpayer's final choice in strategy.

In order to decertify the debt as seriously delinquent the debt needs to be either:

- a. Unenforceable (CSEDs expired),
- b. Paid in full.
- c. Establish an Installment Agreement or Currently Not Collectible (CNC), or
- d. Completed Offer in Compromise.

Once the debt has met these requirements the IRS has 30 days to send the data to the State Department and the State Department has 45 days to update its system. That means that based on the latest CSED of 4/8/2026 the taxpayer is looking at worst case scenario of late June of 2026 to successfully renew their passport. Not sure if that works for them.

The additional issue of the LTR 16 is concerning as well and whether the taxpayer wants to wait it out will depend on their risk tolerance PLUS how much they have to lose by being transparent with their income/assets. Every indication I am seeing from the IRS is that they are really trying to get the levies going again (how successful they will be is uncertain like much with the IRS at this point). Interestingly, 2014 does not reflect a Final Notice of Intent to Levy (seems an odd oversight on a period with some odd coding already RE the additional assessment). 2009 does reflect a Final Notice and has a remaining balance due according to IRS CSEDs.

At this point is the taxpayer comfortable trying to ride it out for the next 9 months with the understanding they are at risk or would they rather just enter into an IA to stay protected and renew their passport? P.S. maybe after entering into an IA can review and evaluate CSED correctness for the 2009 period?



Тахр	ayer has already had over \$160k written off, with more pending for part of the 2009
bala	nce due. Might help keep things in perspective as they navigate their options
thro	ugh these last few months of the debt.

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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
2024	No	НОН	\$0.00				
2023	Original	НОН	\$378,844.00	\$10,422.57	\$0.00	8/7/2025	0
2022	Original	HOH	\$379,079.00	\$6,836.58	\$0.00	8/7/2025	0
2021	Original	HOH	\$263,465.00	\$3,070.28	\$8.64	8/7/2025	<b>②</b>
2020	Original	HOH	\$120,744.00	\$1,630.06	\$0.00	8/7/2025	Ø
2019	Original	HOH	\$104,673.00	\$1,912.89	\$0.00	8/7/2025	0
2018	Original	S	\$34,377.00	\$1,388.27	\$0.00	8/7/2025	0
2017	Original	HOH	\$49,206.00	\$2,122.20	\$0.00	8/7/2025	0
2016	Original	HOH	\$75,598.00	\$4,547.54	\$0.00	8/7/2025	0
2015	Original	HOH	\$64,752.00	\$1,708.17	\$0.00	8/7/2025	0
2014	Original	HOH	\$58,163.00	\$53,296.58	\$100,358.88	8/7/2025	<b>②</b>
2013	Original	HOH	\$73,830.00	\$45,941.35	\$0.00	8/7/2025	0
2012	Original	HOH	\$44,169.00	\$22,405.14	\$0.00	8/7/2025	0
2011	Original	HOH	\$36,973.00	\$20,012.76	\$0.00	8/7/2025	0
2010	Original	MFS	\$23,327.00	\$19,931.80	\$0.00	8/7/2025	0
2009	Original	MFS	\$102,666.00	\$151,774.26	\$252,198.82	8/7/2025	<b>②</b>
		Totals:	\$1,809,866.00	\$347,000.45	\$352,566.34		

#### Return Filed Definitions:

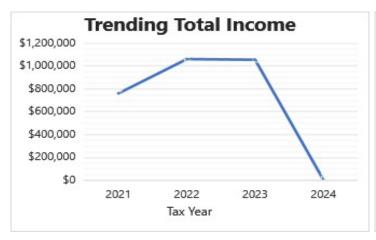
Original = Return filed	SFR = IRS filed return with no deductions or credits
Amended = Amended return filed	No = no return filed
	RDNF = IRS has no data

#### Opportunities:

2024 - No return filed. Check for filing requirement.

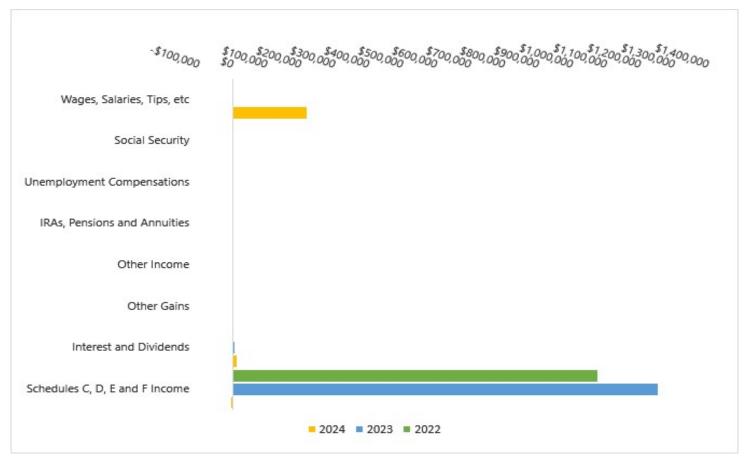
#### Issues:

2009 - Taxes owed for this tax year: \$252,199 2014 - Federal tax lien issued on: 12/25/2015 2014 - Taxes owed for this tax year: \$100,359 2021 - Taxes owed for this tax year: \$9





Income Breakdown



Income Breakdown	2022	2023	2024
Wage & Income Transcript Date	8/7/2025	8/7/2025	8/7/2025
Wages, Salaries, Tips, etc	\$0	\$0	\$215,625
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	\$1,201	\$4,563	\$9,224
Schedules C, D, E and F Income	\$1,074,245	\$1,250,988	(\$4,992)

#### IRS ACCOUNT STATUS DASHBOARD

Year	Return Filed	Filing Status	Extension Date	Lien Active	Collections Active	Examination Active	Assessed Balance	Accrued Balance	Transcript Date
2025	No	HOH					(\$125,000.00)	(\$125,000.00)	8/7/2025
2024	No	HOH	10/15/2025				(\$150,000.00)	(\$150,000.00)	8/7/2025
2023	Original	HOH	10/15/2024				\$0.00	\$0.00	8/7/2025
2022	Original	НОН	10/15/2023				\$0.00	\$0.00	8/7/2025
2021	Original	НОН	10/15/2022				\$0.00	\$8.64	8/7/2025
2020	Original	НОН	10/15/2021				\$0.00	\$0.00	8/7/2025
2019	Original	НОН	10/15/2020				\$0.00	\$0.00	8/7/2025
2018	Original	S	10/15/2019				\$0.00	\$0.00	8/7/2025
2017	Original	НОН	10/15/2018				\$0.00	\$0.00	8/7/2025
2016	Original	НОН	10/15/2017				\$0.00	\$0.00	8/7/2025
2015	Original	HOH	10/15/2016				\$0.00	\$0.00	8/7/2025
2014	Original	НОН	10/15/2015	12/25/2015	No		\$79,495.63	\$100,358.88	8/7/2025
2013	Original	НОН	10/15/2014	Removed			\$0.00	\$0.00	8/7/2025
2012	Original	HOH	10/15/2013	Removed			\$0.00	\$0.00	8/7/2025
2011	Original	HOH	10/15/2012	Removed			\$0.00	\$0.00	8/7/2025
2010		MFS	10/15/2011	Removed			\$0.00	\$0.00	8/7/2025
2009	Original	MFS	10/15/2010	Removed	3/13/2019	Closed#	\$201,456.82	\$252,198.82	8/7/2025
	_					Total	\$280,952.45	\$352,566.34	

\*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	2015	2016		2018		2020	2021	2022			Totals
· · · · · · · · · · · · · · · · · · ·	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	
Qualified Nonrecourse Beginning:	-	-	-	-	\$1,008,830	\$1,229,724	\$1,760,921	\$1,695,154	\$1,931,968	-	\$7,626,597
Qualified Nonrecourse Ending:	-	-	-	-	\$1,229,724	\$1,760,921	\$1,695,153	\$2,066,092	\$440,177	\$74,950	\$7,267,017
Ordinary Income K-1:	-	\$236,061	\$173,067	\$176,517	\$293,408	\$381,591	\$720,661	\$1,006,054	\$1,002,836	-	\$3,990,195
Nonrecourse Beginning:	-	-	-	\$56,773	\$191,618	\$194,546	\$288,325	\$825,099	\$818,124	-	\$2,374,485
Recourse Ending:	-	-	-	-	-	-	-	-	-	\$1,265,391	\$1,265,391
Recourse Beginning:	-	-	-	\$201,093	\$234,912	\$245,192	\$214,878	\$223,030	-	-	\$1,119,105
Real Estate:	-	-	(\$23,107)	\$102,273	\$94,855	\$22,801	\$71,330	\$60,984	\$34,634	(\$4,992)	\$358,778
Medicare Wages:	\$13,000	\$17,080	\$1,000	-	-	-	-	-	-	\$215,625	\$246,705
Wages:	\$13,000	\$17,080	\$1,000	\$0	\$0	\$0	\$0	\$0	\$0	\$215,625	\$246,705
Federal Tax Withheld:	\$457	\$690	\$65	\$0	\$0	\$0	\$0	\$0	\$0	\$201,904	\$203,116
Taxable FICA Wages:	\$13,000	\$17,080	\$1,000	-	-	-	-	-	-	\$168,600	\$199,680
Mortgage Interest Paid:	\$10,248	\$10,309	\$11,059	\$12,787	\$15,750	\$12,647	\$8,409	\$8,023	\$12,185	\$15,991	\$117,408
Student Loan Interest:	\$13,980	\$13,067	\$11,882	\$12,742	\$11,046	\$10,827	\$10,399	\$9,905	\$11,992	\$6,738	\$112,578
Total Guaranteed Payments:	-	-	-	-	\$14,800	\$15,893	\$11,415	\$19,442	\$19,587	-	\$81,137
Proceeds:	\$5,564	-	\$1,992	-	-	-	\$19,056	\$7,207	\$32,405	-	\$66,224
Fair Market Value:	\$460	\$462	\$465	\$1,120	\$472	\$474	\$7,780	\$12,570	\$14,079	\$13,511	\$51,393
Cost or Other Basis:	\$4,886	-	\$1,975	-	-	-	\$17,151	\$9,546	\$1,391	-	\$34,949
Guaranteed Payments:	-	\$9,475	\$8,378	\$14,396	-	-	-	-	-	-	\$32,249
IRA Contributions:	\$0	\$0	\$0	\$0	\$0	\$0	\$7,000	\$6,250	\$625	\$0	\$13,875
Amount of Debt Discharged:	\$12,477	-	-	-	-	-	-	-	-	-	\$12,477
FICA Tax Withheld:	\$806	\$1,058	\$62	-	-	-	-	-	-	\$10,453	\$12,379
Gross Distributions:	\$4,014	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,014
Taxable Amount:	\$4,014	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,014
Medicare Withheld:	\$188	\$247	\$14	-	-	-	-	-	-	\$3,267	\$3,716
Ordinary Dividends:	\$10	-	-	-	-	-	\$28	\$637	\$780	\$316	\$1,771
Qualified Dividends:	\$10	-	-	-	-	-	\$19	\$512	\$537	\$82	\$1,160
Other Income:	-	-	-	-	-	-	\$11	\$40	\$389	-	\$440
Interest:	\$0	\$130	\$0	\$28	\$31	\$27	\$24	\$52	\$105	\$21	\$418
Wash Sale Loss Disallowed:	-	-	-	-	-	-	\$35	\$168	\$122	-	\$325
Foreign Tax Paid:	-	-	-	-	-	-	-	\$31	\$12	\$3	\$46
Section 199A REIT Dividends:	-	-	-	-	-	-	-	-	\$2	\$3	\$5
Allocated Tips:	\$0	\$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	\$0
Non-employee Compensation:	\$0	\$0	\$0	\$0	\$0	-	-	-	-	-	\$0
Nonemployee Compensation:	-	-	-	-	-	\$0	\$0	\$0	\$0	\$0	\$0
Pensions and Annuities:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

<sup>\*\*</sup>T = Taxpayer S = Spouse B = Both

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

## WAGE INCOME SUMMARY (cont.)

Definitions	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Totals	
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
Real Estate Sales:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Savings Bonds:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

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

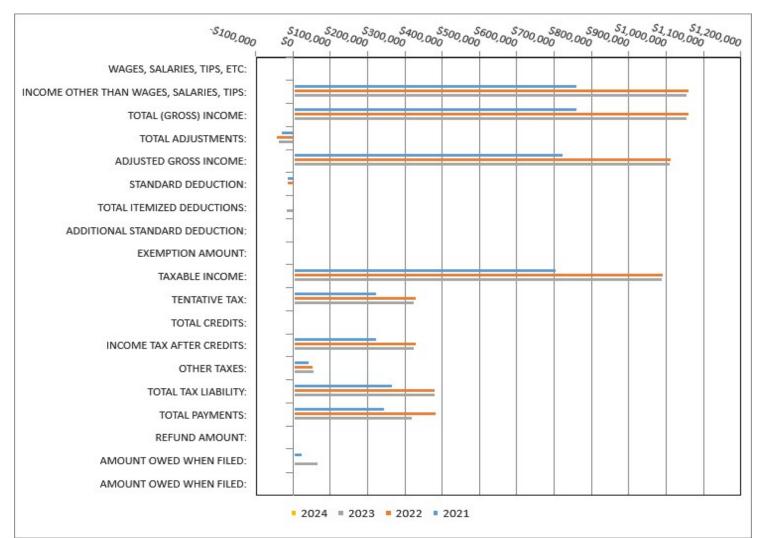
\*Summary Transcripts should not be used to create tax returns or amended returns due to their innaccuracies. Use the All Forms Wage and Income Transcripts.

# INCOME DOCUMENTS

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Totals
Transcript Date:	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	8/7/2025	
W-2		1	1 1		0	0	0 (	(	0	1	4
1098		1	1 1		1	1	1 1	1	1	1	10
1098-C		0	) (	)	0	0	0 (	(	0	C	0
1098-E		1	1 1		2	1	1 1	1	2	2	13
1098-T		0	) (		0	0	0 (	(	0	C	
5498	;	3	2 2		4	2	2 3	3	4	4	29
5498 SA		0	) (		0	0	0 (	(	0	C	
1099-A		0	) (		0	0	0 (	) (	0	C	0
1099-B		9	40		0	0	0 84	57	88	C	278
1099-C		2	) (	)	0	0	0 (	C	0	C	
1099-CAP		0	) (		0	0	0 (	C	0	C	
1099-DIV		1	) (	)	0	0	0 2	2 3	4	2	12
1099-G		0	) (		0	0	0 (	(	0	C	
1099-H		0	) (		0	0	0 0	C	0	C	0
1099-INT		0	) (		1	2	1 1	2	4	2	13
1099-K		0	) (		0	0	0 (	(	0	C	
1099-LTC		0	) (		0	0	0 (	C	0	C	
1099-MISC		0	) (		0	0	0 1	1	1	C	
1099-OID		0	) (		0	0	0 (	C	0	C	
1099-PATR		0	) (		0	0	0 (	(	0	C	
1099-Q		0	) (		0	0	0 (	) (	0	C	
1099-R		1	) (		0	0	0 0	C	0	C	
1099-S		0	) (		0	0	0 (	C	0	C	0
1099-SA		0	) (		0	0	0 (	) (	0	C	0
1042-S		0	) (		0	0	0 (	C	0	C	0
SSA-1099		0	) (		0	0	0 (	) (	0	C	0
SSA-1042S		0	) (		0	0	0 (	C	0	C	0
RRB-1099		0	) (		0	0	0 (	) (	0	C	0
RRB-1099R		0	) (		0	0	0 (	(	0	C	0
RRB-1042S		0	) (		0	0	0 (	) (	0	C	0
W-2G		0	) (		0	0	0 (	C	0	C	0
K-1 1041		0	) (		0	0	0 (	) (	0	C	
K-1 1065		1 :	2 2		2	2	3	5	5	2	27
K-1 1120s		0	) (		0	0	0 (	) (	0	C	
W-4		0	) (		0	0	0 (	) (	0	C	
3921		0	) (		0	0	0 (	) (	0	C	
3922		0	) (		0	0	0 (	) (	0	C	
8805		0	) (		0	0	0 (	) (	0	C	

# INCOME DOCUMENTS (cont.)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Totals
1097-BTC	0	0	0	0	0	0	0	0	0	0	0
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	20	7	47	10	8	8	96	73	109	14	392



TAX SUMMARY         2021         2022         2023         2024           RETURN TRANSCRIPT DATE         877/2025         8					
TAX RETURN FILED:         Original         Original         Original         No           TYPE OF RETURN:         1040         1040         1040         1040         1040         1040 Series           WAGES, SALARIES, TIPS, ETC:         \$0	TAX SUMMARY	2021	2022	2023	2024
TYPE OF RETURN:  WAGES, SALARIES, TIPS, ETC:  \( \) \(	RETURN TRANSCRIPT DATE	8/7/2025	8/7/2025	8/7/2025	8/7/2025
WAGES, SALARIES, TIPS, ETC:  INCOME OTHER THAN WAGES, SALARIES, TIPS:  S758,288  \$1,058,999  \$1,053,430  TOTAL (GROSS) INCOME:  \$758,288  \$1,058,999  \$1,053,430  TOTAL ADJUSTMENTS:  (\$36,834)  ADJUSTED GROSS INCOME:  \$721,454  \$1,010,732  \$1,009,944  STANDARD DEDUCTION:  (\$18,800)  **TOTAL ITEMIZED DEDUCTIONS:  ADDITIONAL STANDARD DEDUCTION:  \$0  \$0  \$0  EXEMPTION AMOUNT:  \$0  \$0  \$0  \$0  EXEMPTION AMOUNT:  \$0  \$0  \$0  \$0  \$0  INCOME TAX AFTER CREDITS:  \$222,490  \$327,374  \$323,667  TOTAL CREDITS:  \$40,975  \$51,705  \$551,777  TOTAL TAX LIABILITY:  \$263,465  \$379,079  \$378,844  TOTAL PAYMENTS:  \$243,000  \$80  \$319,000  \$319,000  \$319,000  \$40  \$40  \$40,975  \$40,	TAX RETURN FILED:	Original	Original	Original	No
INCOME OTHER THAN WAGES, SALARIES, TIPS:   \$758,288   \$1,058,999   \$1,053,430     TOTAL (GROSS) INCOME:   \$758,288   \$1,058,999   \$1,053,430     TOTAL ADJUSTMENTS:   (\$36,834)   (\$48,267)   (\$43,486)     ADJUSTED GROSS INCOME:   \$721,454   \$1,010,732   \$1,009,944     STANDARD DEDUCTION:   (\$18,800)   (\$19,400)   \$0     TOTAL ITEMIZED DEDUCTIONS:   - (\$23,070)     ADDITIONAL STANDARD DEDUCTION:   \$0   \$0     EXEMPTION AMOUNT:   \$0   \$0     TAXABLE INCOME:   \$702,354   \$989,204   \$986,870     TENTATIVE TAX:   \$222,490   \$327,374   \$323,667     TOTAL CREDITS:   \$0   \$0     INCOME TAX AFTER CREDITS:   \$22,490   \$327,374   \$323,667     OTHER TAXES:   \$40,975   \$51,705   \$55,177     TOTAL TAX LIABILITY:   \$263,465   \$379,079   \$378,844     TOTAL PAYMENTS:   \$243,000   \$381,090     REFUND AMOUNT:   - (AMOUNT OWED WHEN FILED:   \$22,131   \$2,014   \$65,843	TYPE OF RETURN:	1040	1040	1040	1040 Series
TOTAL (GROSS) INCOME: \$758,288 \$1,058,999 \$1,053,430 TOTAL ADJUSTMENTS: \$36,834 \$1,010,732 \$1,009,944 \$1,009,944 \$1,009,9	WAGES, SALARIES, TIPS, ETC:	\$0	\$0	\$0	-
TOTAL ADJUSTMENTS:         (\$36,834)         (\$48,267)         (\$43,486)           ADJUSTED GROSS INCOME:         \$721,454         \$1,010,732         \$1,009,944           STANDARD DEDUCTION:         (\$18,800)         (\$19,400)         \$0           TOTAL ITEMIZED DEDUCTIONS:         -         -         (\$23,070)           ADDITIONAL STANDARD DEDUCTION:         \$0         \$0         \$0           EXEMPTION AMOUNT:         \$0         \$0         \$0           TAXABLE INCOME:         \$702,354         \$989,204         \$986,870           TENTATIVE TAX:         \$222,490         \$327,374         \$323,667           TOTAL CREDITS:         \$0         \$0         \$0           INCOME TAX AFTER CREDITS:         \$222,490         \$327,374         \$323,667           OTHER TAXES:         \$40,975         \$51,705         \$55,177           TOTAL TAX LIABILITY:         \$263,465         \$379,079         \$378,844           TOTAL PAYMENTS:         \$243,000         \$381,090         \$319,000           REFUND AMOUNT:         -         -         -           AMOUNT OWED WHEN FILED:         \$22,131         \$2,014         \$65,843	INCOME OTHER THAN WAGES, SALARIES, TIPS:	\$758,288	\$1,058,999	\$1,053,430	-
ADJUSTED GROSS INCOME: \$721,454 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,010,732 \$1,009,944 \$1,000,944 \$	TOTAL (GROSS) INCOME:	\$758,288	\$1,058,999	\$1,053,430	-
STANDARD DEDUCTION:       (\$18,800)       (\$19,400)       \$0         TOTAL ITEMIZED DEDUCTIONS:       -       (\$23,070)         ADDITIONAL STANDARD DEDUCTION:       \$0       \$0       \$0         EXEMPTION AMOUNT:       \$0       \$0       \$0         TAXABLE INCOME:       \$702,354       \$989,204       \$986,870         TENTATIVE TAX:       \$222,490       \$327,374       \$323,667         TOTAL CREDITS:       \$0       \$0       \$0         INCOME TAX AFTER CREDITS:       \$222,490       \$327,374       \$323,667         OTHER TAXES:       \$40,975       \$51,705       \$55,177         TOTAL TAX LIABILITY:       \$263,465       \$379,079       \$378,844         TOTAL PAYMENTS:       \$243,000       \$381,090       \$319,000         REFUND AMOUNT:       -       -       -         AMOUNT OWED WHEN FILED:       \$22,131       \$2,014       \$65,843	TOTAL ADJUSTMENTS:	(\$36,834)	(\$48,267)	(\$43,486)	-
TOTAL ITEMIZED DEDUCTIONS:  ADDITIONAL STANDARD DEDUCTION:  \$0 \$0 \$0 \$0  EXEMPTION AMOUNT:  \$0 \$0 \$0 \$0  TAXABLE INCOME:  \$702,354 \$989,204 \$986,870  TENTATIVE TAX:  \$222,490 \$327,374 \$323,667  TOTAL CREDITS:  \$0 \$0 \$0  INCOME TAX AFTER CREDITS:  \$222,490 \$327,374 \$323,667  OTHER TAXES:  \$40,975 \$51,705 \$55,177  TOTAL TAX LIABILITY:  \$263,465 \$379,079 \$378,844  TOTAL PAYMENTS:  \$243,000 \$381,090  REFUND AMOUNT:	ADJUSTED GROSS INCOME:	\$721,454	\$1,010,732	\$1,009,944	-
ADDITIONAL STANDARD DEDUCTION:  EXEMPTION AMOUNT:  \$0 \$0 \$0 \$0 \$0  TAXABLE INCOME:  \$702,354 \$989,204 \$986,870  TENTATIVE TAX:  \$222,490 \$327,374 \$323,667  TOTAL CREDITS:  \$0 \$0 \$0 \$0  \$0  \$0  \$0  \$0  TOTAL CREDITS:  \$0 \$0 \$0 \$0 \$0 \$0  \$0  \$0  \$0  \$0  \$0	STANDARD DEDUCTION:	(\$18,800)	(\$19,400)	\$0	-
EXEMPTION AMOUNT:       \$0       \$0       \$0         TAXABLE INCOME:       \$702,354       \$989,204       \$986,870         TENTATIVE TAX:       \$222,490       \$327,374       \$323,667         TOTAL CREDITS:       \$0       \$0       \$0         INCOME TAX AFTER CREDITS:       \$222,490       \$327,374       \$323,667         OTHER TAXES:       \$40,975       \$51,705       \$55,177         TOTAL TAX LIABILITY:       \$263,465       \$379,079       \$378,844         TOTAL PAYMENTS:       \$243,000       \$381,090       \$319,000         REFUND AMOUNT:       -       -       -         AMOUNT OWED WHEN FILED:       \$22,131       \$2,014       \$65,843	TOTAL ITEMIZED DEDUCTIONS:	-	-	(\$23,070)	-
TAXABLE INCOME:       \$702,354       \$989,204       \$986,870         TENTATIVE TAX:       \$222,490       \$327,374       \$323,667         TOTAL CREDITS:       \$0       \$0       \$0         INCOME TAX AFTER CREDITS:       \$222,490       \$327,374       \$323,667         OTHER TAXES:       \$40,975       \$51,705       \$55,177         TOTAL TAX LIABILITY:       \$263,465       \$379,079       \$378,844         TOTAL PAYMENTS:       \$243,000       \$381,090       \$319,000         REFUND AMOUNT:       -       -       -         AMOUNT OWED WHEN FILED:       \$22,131       \$2,014       \$65,843	ADDITIONAL STANDARD DEDUCTION:	\$0	\$0	\$0	-
TENTATIVE TAX:         \$222,490         \$327,374         \$323,667           TOTAL CREDITS:         \$0         \$0         \$0           INCOME TAX AFTER CREDITS:         \$222,490         \$327,374         \$323,667           OTHER TAXES:         \$40,975         \$51,705         \$55,177           TOTAL TAX LIABILITY:         \$263,465         \$379,079         \$378,844           TOTAL PAYMENTS:         \$243,000         \$381,090         \$319,000           REFUND AMOUNT:         -         -         -           AMOUNT OWED WHEN FILED:         \$22,131         \$2,014         \$65,843	EXEMPTION AMOUNT:	\$0	\$0	\$0	-
TOTAL CREDITS:         \$0         \$0         \$0           INCOME TAX AFTER CREDITS:         \$222,490         \$327,374         \$323,667           OTHER TAXES:         \$40,975         \$51,705         \$55,177           TOTAL TAX LIABILITY:         \$263,465         \$379,079         \$378,844           TOTAL PAYMENTS:         \$243,000         \$381,090         \$319,000           REFUND AMOUNT:         -         -         -           AMOUNT OWED WHEN FILED:         \$22,131         \$2,014         \$65,843	TAXABLE INCOME:	\$702,354	\$989,204	\$986,870	-
INCOME TAX AFTER CREDITS:         \$222,490         \$327,374         \$323,667           OTHER TAXES:         \$40,975         \$51,705         \$55,177           TOTAL TAX LIABILITY:         \$263,465         \$379,079         \$378,844           TOTAL PAYMENTS:         \$243,000         \$381,090         \$319,000           REFUND AMOUNT:         -         -         -           AMOUNT OWED WHEN FILED:         \$22,131         \$2,014         \$65,843	TENTATIVE TAX:	\$222,490	\$327,374	\$323,667	-
OTHER TAXES:         \$40,975         \$51,705         \$55,177           TOTAL TAX LIABILITY:         \$263,465         \$379,079         \$378,844           TOTAL PAYMENTS:         \$243,000         \$381,090         \$319,000           REFUND AMOUNT:         -         -         -           AMOUNT OWED WHEN FILED:         \$22,131         \$2,014         \$65,843	TOTAL CREDITS:	\$0	\$0	\$0	-
TOTAL TAX LIABILITY:         \$263,465         \$379,079         \$378,844           TOTAL PAYMENTS:         \$243,000         \$381,090         \$319,000           REFUND AMOUNT:         -         -         -           AMOUNT OWED WHEN FILED:         \$22,131         \$2,014         \$65,843	INCOME TAX AFTER CREDITS:	\$222,490	\$327,374	\$323,667	-
TOTAL PAYMENTS:       \$243,000       \$381,090       \$319,000         REFUND AMOUNT:       -       -       -         AMOUNT OWED WHEN FILED:       \$22,131       \$2,014       \$65,843	OTHER TAXES:	\$40,975	\$51,705	\$55,177	-
REFUND AMOUNT:	TOTAL TAX LIABILITY:	\$263,465	\$379,079	\$378,844	-
AMOUNT OWED WHEN FILED: \$22,131 \$2,014 \$65,843	TOTAL PAYMENTS:	\$243,000	\$381,090	\$319,000	-
, , , , , , , , , , , , , , , , , , ,	REFUND AMOUNT:	-	-	-	-
AMOUNT OWED WHEN FILED:	AMOUNT OWED WHEN FILED:	\$22,131	\$2,014	\$65,843	-
	AMOUNT OWED WHEN FILED:				

#### CSED CALCULATIONS AND IA PAYMENTS

Original Estimated THS Months Payments CSED Paym													
Vear   Code   Assessment					0	Domaining		THS		CCED Dava		Payments CSED	Estimated IA Payments 72 Mths
150   Tax return   Flied	Year	Code	Assessment	Date			0		IRS CSED				(Including Daily Accrued Interest)**
150   Tax return filed		Couc	Acception	Date	7 unount	Daiarioo	Dayo	COLD	II TO GOLD	Variation	OOLD	/ toordod intorooty	7 tool dod intoloot)
276 Penalty for late payment of tax		150	Tax return filed	11/11/2024	\$378.844.00	\$0.00		11/12/2034	11/11/2034	0	_	\$0.00	
176 Penalty for not pre-paying tax		276	Penalty for late payment of tax										
196   Interest charged for late payment   11/11/2024   \$2,257,14   \$0,00   11/12/2034   11/11/2034   0   \$0,00   196   Interest charged for late payment   2/10/2025   \$1.70   \$0,00   11/12/2034   11/11/2034   \$0.00   \$0.										0	-		
196   Interest charged for late payment   11/11/2024   \$184.87   \$0.00   11/12/2034   \$1.00   \$0.00   \$0.00   \$1.00		196	Interest charged for late payment							0	-		
196   Interest charged for late payment   2/10/2025   \$1.70   \$0.00   11/12/2034   \$0.00   2023 Recrused Caredits/Other   \$0.00   11/12/2034   \$0.00   2023 Accrused Penalty   \$0.00   11/12/2034   \$0.00   2023 Accrused Interest   \$0.00   11/12/2034   \$0.00   2023 Total IA Payments   \$0.00   11/12/2034   \$0.00   2023 Total IA Payments   \$0.00   11/12/2034   \$0.00   2022   \$0.00   2023 Total IA Payment   \$0.00   11/12/2034   \$0.00   2026 Penalty for late payment of tax   11/6/2023   \$2.039.67   \$0.00   11/17/2033   11/6/2033   \$0.00   \$0.00   276 Penalty for not pre-paying tax   11/6/2023   \$2.393.67   \$0.00   11/17/2033   11/6/2033   \$0.00   \$0.00   2027 Reversed Credits/Other   \$0.00   11/17/2033   11/6/2033   \$0.00   \$0.00   2027 Reversed Credits/Other   \$0.00   11/17/2033   \$0.00   \$0.00   2022 Accrued Penalty   \$0.00   11/17/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2032   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.00   \$0.00   \$1.77/2033   \$0.00   \$0.00   \$0.										0	-		
2023 Reversed Credits/Other   \$0.00   11/12/2034   - \$0.00   2023 Accrued Penalty   \$0.00   11/12/2034   - \$0.00   2023 Accrued Penalty   \$0.00   11/12/2034   - \$0.00   2023 Total IA Payments   \$0.00   11/12/2034   - \$0.00   2023 Total IA Payments   \$0.00   11/12/2034   - \$0.00   2024 Total IA Payments   \$0.00   11/12/2034   - \$0.00   2026 Penalty for late payment of tax   \$0.00   \$0.0		196	Interest charged for late payment								-	\$0.00	
2023 Accrued Interest   \$0.00   11/12/2034   - \$0.00   \$0.00			2023 Reversed Credits/Other					11/12/2034			-	\$0.00	
2023 Accrued Interest   \$0.00   11/12/2034   - \$0.00   \$0.00			2023 Accrued Penalty			\$0.00		11/12/2034			-	\$0.00	
2022   150   Tax return filed						\$0.00		11/12/2034			-		
150 Tax return filed			2023 Total IA Payments									\$0.00	
276 Penalty for late payment of tax 11/6/2023 \$2,039.67 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2031 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/2033 11/6/2033 0 \$0.00 11/7/203	2022												
176 Penalty for not pre-paying tax												\$0.00	
196   Interest charged for late payment   11/6/2023   \$2.426.60   \$0.00   11/7/2033   11/6/2033   0 -   \$0.00   2022 Recrued Penalty   \$0.00   11/7/2033   -   \$0.00   2022 Accrued Interest   \$0.00   11/7/2033   -   \$0.00   2022 Accrued Interest   \$0.00   11/7/2033   -   \$0.00   2022 Total IA Payments   \$0.00   11/7/2033   -   \$0.00   2022 Total IA Payments   \$0.00   11/8/2032   11/7/2032   0 -   \$0.00   2026   Penalty for late payment of tax   11/7/2022   \$863.94   \$0.00   11/8/2032   11/7/2032   0 -   \$0.00   2026   Penalty for not pre-paying tax   11/7/2022   \$863.94   \$0.00   11/8/2032   11/7/2032   0 -   \$0.00   2021 Recrued Penalty   \$0.00   11/8/2032   11/7/2032   0 -   \$0.00   2021 Recrued Penalty   \$0.00   11/8/2032   11/7/2032   -   \$0.00   2021 Accrued Penalty   \$0.00   11/8/2032   -   \$0.00   2021 Accrued Interest   \$8.64   11/8/2031   -   \$0.00   2021 Accrued Interest   \$8.64   11/8/2031   -   \$0.00   2021 Accrued Interest   \$8.64   11/8/2031   -   \$0.00   2021 Accrued Interest   \$8.64   2021 Accrued Interest				11/6/2023									
2022 Reversed Credits/Other													
2022 Accrued Penalty   \$0.00   11/7/2033   - \$0.00   2022 Total IA Payments   \$0.00   11/7/2033   - \$0.00   2022 Total IA Payments   \$0.00   11/7/2033   - \$0.00   2021   \$0.00   2021   \$0.00   \$0.00   11/7/2032   \$0.00   2021   \$		196	Interest charged for late payment	11/6/2023	\$2,426.60					0	-		
2022   Accrued Interest   \$0.00   11/7/2033   - \$0.00											-		
2021											-		
150   Tax return filed   11/7/2022   \$263,465.00   \$0.00   11/8/2032   11/7/2032   0 -   \$0.00						\$0.00		11/7/2033			-		
150   Tax return filed			2022 Total IA Payments									\$0.00	
276 Penalty for late payment of tax	2021		T CI I										
176 Penalty for not pre-paying tax 11/7/2022 \$1,556.39 \$0.00 196 Interest charged for late payment 11/7/2022 \$641.31 \$0.00 11/8/2032 11/7/2032 0 - \$0.00 2021 Reversed Credits/Other 2021 Accrued Penalty 2021 Accrued Interest 30.00 11/8/2032 - \$0.00 2021 Accrued Interest 30.00 11/8/2032 - \$0.00 2021 Accrued Interest 30.00 11/8/2032 - \$0.00 2021 Total IA Payments 2020 150 Tax return filed 11/8/2021 \$120,744.00 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 276 Penalty for late payment of tax 11/8/2021 \$356.10 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 176 Penalty for not pre-paying tax 11/8/2021 \$1.131.06 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 11/8/2021 \$99.61 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 11/8/2021 \$42.84 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 2/14/2022 \$0.45 \$0.00 11/9/2031 uk - \$0.00 2020 Reversed Credits/Other 2020 Accrued Penalty \$0.00 11/9/2031 - \$0.00 2020 Accrued Penalty \$0.00 11/9/2031 - \$0.00 2020 Accrued Interest \$0.00 11/9/2031 - \$0.00 2020 Accrued Interest \$0.00 11/9/2031 - \$0.00													
196   Interest charged for late payment   11/7/2022   \$641.31   \$0.00   11/8/2032   11/7/2032   0   \$0.00   2021 Reversed Credits/Other   \$0.00   11/8/2032   - \$0.00   \$0.00   2021 Accrued Penalty   \$0.00   11/8/2032   - \$0.00   \$0.00   2021 Accrued Interest   \$8.64   11/8/2032   - \$0.00   \$													
2021 Reversed Credits/Other   \$0.00   \$11/8/2032   - \$0.00   \$0.00   \$0.00   \$11/8/2032   - \$0.00   \$0.00													
2021 Accrued Penalty \$0.00 \$11/8/2032 \$ \$0.00 \$2021 Accrued Interest \$ \$8.64 \$11/8/2032 \$ 88 \$0.13 \$ 2021 Total IA Payments \$ \$0.00 \$11/8/2031 \$11/8/2031 \$0.13 \$ \$0.1				11///2022	\$641.31					0	-		
2021 Accrued Interest   \$8.64   11/8/2032   88   \$0.13											-		
2020 \$\frac{150}{2020}\$ \text{Total IA Payments}\$ \$\frac{11/8/2021}{2020}\$ \text{\$120,744.00}\$ \$\frac{120,744.00}{2020}\$ \$\frac{150}{2020}\$ \text{\$11/8/2031}\$ \$\frac{11/8/2031}{2020}\$ \text{\$11/8/2021}\$ \$\frac{120,744.00}{2020}\$ \$\frac{120,744.00}{2020}\$ \$\frac{11/9/2031}{2020}\$ \text{\$11/8/2031}\$ \$\frac{11/8/2031}{2020}\$ \$\frac{11/8/2031}{2020}\$ \$\frac{11/8/2031}{2020}\$ \$\frac{11/8/2021}{2020}\$ \$\frac{11/8/2021}{2020}\$ \$\frac{11/8/2021}{2020}\$ \$\frac{11/8/2021}{2020}\$ \$\frac{11/8/2021}{2020}\$ \$\frac{11/9/2031}{2020}\$ \$\frac{11/9/2031}{2020			2021 Accrued Penalty								-		40.45
2020  150 Tax return filed 11/8/2021 \$120,744.00 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 276 Penalty for late payment of tax 11/8/2021 \$356.10 \$0.00 176 Penalty for not pre-paying tax 11/8/2021 \$1,131.06 \$0.00 196 Interest charged for late payment 11/8/2021 \$99.61 \$0.00 196 Interest charged for late payment 11/8/2021 \$99.61 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 11/8/2021 \$42.84 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 2/14/2022 \$0.45 \$0.00 11/9/2031 uk 2020 Reversed Credits/Other 2020 Accrued Penalty 50.00 2020 Accrued Interest \$0.00 11/9/2031 - \$0.00 2020 Accrued Interest \$0.00 11/9/2031 - \$0.00 \$0.						\$8.64		11/8/2032			88		\$0.15
150 Tax return filed 11/8/2021 \$120,744.00 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 276 Penalty for late payment of tax 11/8/2021 \$356.10 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 176 Penalty for not pre-paying tax 11/8/2021 \$1,131.06 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 11/8/2021 \$99.61 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 11/8/2021 \$42.84 \$0.00 11/9/2031 11/8/2031 0 - \$0.00 196 Interest charged for late payment 2/14/2022 \$0.45 \$0.00 11/9/2031 uk - \$0.00 2020 Reversed Credits/Other \$0.00 11/9/2031 - \$0.00 2020 Accrued Penalty \$0.00 11/9/2031 - \$0.00 2020 Accrued Interest \$0.00 11/9/2031 - \$0.00	2020		2021 Total in Payments									\$0.13	
276 Penalty for late payment of tax       11/8/2021       \$356.10       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         176 Penalty for not pre-paying tax       11/8/2021       \$1,131.06       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       11/8/2021       \$99.61       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       11/8/2021       \$42.84       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       2/14/2022       \$0.45       \$0.00       11/9/2031 uk       -       \$0.00         2020 Reversed Credits/Other       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00	2020	150	Tay return filed	11/0/2021	¢120.744.00	¢0.00		11/0/2021	11/0/2021	0		¢0.00	
176 Penalty for not pre-paying tax       11/8/2021       \$1,131.06       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       11/8/2021       \$99.61       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       11/8/2021       \$42.84       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       2/14/2022       \$0.45       \$0.00       11/9/2031 uk       -       \$0.00         2020 Reversed Credits/Other       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00												7 0 . 0 0	
196 Interest charged for late payment       11/8/2021       \$99.61       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       11/8/2021       \$42.84       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       2/14/2022       \$0.45       \$0.00       11/9/2031 uk       -       \$0.00         2020 Reversed Credits/Other       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00													
196 Interest charged for late payment       11/8/2021       \$42.84       \$0.00       11/9/2031       11/8/2031       0 -       \$0.00         196 Interest charged for late payment       2/14/2022       \$0.45       \$0.00       11/9/2031 uk       -       \$0.00         2020 Reversed Credits/Other       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00		1/0	Interest charged for late naument										
196 Interest charged for late payment       2/14/2022       \$0.45       \$0.00       11/9/2031 uk       -       \$0.00         2020 Reversed Credits/Other       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00													
2020 Reversed Credits/Other       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00						\$0.00				U	-		
2020 Accrued Penalty       \$0.00       11/9/2031       -       \$0.00         2020 Accrued Interest       \$0.00       11/9/2031       -       \$0.00				2/14/2022	\$0.45				uń		-		
2020 Accrued Interest \$0.00 11/9/2031 - \$0.00											-		
77.77											-		
2020 10(a) 1/1 (4)11(0)(3)						\$0.00		11/7/2031			_		
2019	2019		2020 Total IAT aymonts									φ0.00	
150 Tax return filed 11/2/2020 \$104,673.00 \$0.00 11/3/2030 11/2/2030 0 - \$0.00	2010	150	Tax return filed	11/2/2020	\$104 673 00	\$0.00		11/3/2030	11/2/2020	0	_	\$0.00	
276 Penalty for late payment of tax 11/2/2020 \$820.09 \$0.00 11/3/2030 0- \$0.00													
170 Penalty for not pre-paying tax 11/2/2020 \$688.00 \$0.00 11/3/2030 0- \$0.00													
196 Interest charged for late payment 11/2/2020 \$404.80 \$0.00 11/3/2030 0- \$0.00 \$0.00													

				Original		Estimated	Estimated THS			Months	Estimated IA Payments CSED	Estimated IA Payments 72 Mths
			_	Assessed	Remaining	Total Tolling			CSED Days	Until	(Including Daily	(Including Daily
Year	Code	Assessment	Date	Amount	Balance	Days	CSED	IRS CSED	Variation	CSED	Accrued Interest)**	Accrued Interest)**
2019		2019 Reversed Credits/Other			¢0.00	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	11 /2 /2020				¢0.00	
		2019 Accrued Penalty			\$0.00		11/3/2030			-	\$0.00	
		2019 Accrued Interest			\$0.00		11/3/2030			-	\$0.00	
					\$0.00		11/3/2030			-	\$0.00	
2018		2019 Total IA Payments									\$0.00	
2018	150	Tax return filed	11/4/2010	¢04.077.00	<b>#0.00</b>		11/5/2020	11/1/0000			#O 00	
			11/4/2019	\$34,377.00	\$0.00		11/5/2029			) -	\$0.00	
		Penalty for late payment of tax	11/4/2019	\$188.17	\$0.00		11/5/2029			) -	\$0.00	
		Penalty for not pre-paying tax	11/4/2019	\$1,051.00	\$0.00		11/5/2029			) -	\$0.00	
	196	Interest charged for late payment	11/4/2019	\$149.10	\$0.00		11/5/2029		C	) -	\$0.00	
		2018 Reversed Credits/Other			\$0.00		11/5/2029			-	\$0.00	
		2018 Accrued Penalty			\$0.00		11/5/2029			-	\$0.00	
		2018 Accrued Interest			\$0.00		11/5/2029			-	\$0.00	
		2018 Total IA Payments									\$0.00	
2017		T										
		Tax return filed	11/5/2018	\$49,206.00	\$0.00					) -	\$0.00	
		Penalty for late payment of tax	11/5/2018	\$674.20	\$0.00		12/6/2028			) -	\$0.00	
		Penalty for not pre-paying tax	11/5/2018	\$931.64	\$0.00					) -	\$0.00	
		Interest charged for late payment	11/5/2018	\$490.20	\$0.00		12/6/2028			) -	\$0.00	
	196	Interest charged for late payment	11/5/2018	\$26.16	\$0.00		12/6/2028	12/5/2028	C	) -	\$0.00	
		2017 Reversed Credits/Other			\$0.00	)	12/6/2028			-	\$0.00	
		2017 Accrued Penalty			\$0.00		12/6/2028			-	\$0.00	
		2017 Accrued Interest			\$0.00		12/6/2028			-	\$0.00	
		2017 Total IA Payments									\$0.00	
2016												
		Tax return filed	11/13/2017	\$75,598.00	\$0.00		11/14/2027	11/13/2027	C	) -	\$0.00	
		Penalty for late payment of tax	11/13/2017	\$1,811.12	\$0.00	)	11/14/2027	11/13/2027	C	) -	\$0.00	
		Penalty for not pre-paying tax	11/13/2017	\$1,577.00	\$0.00			11/13/2027	C	) -	\$0.00	
	196	Interest charged for late payment	11/13/2017	\$1,159.42	\$0.00			11/13/2027	C	) -	\$0.00	
		2016 Reversed Credits/Other			\$0.00		11/14/2027			-	\$0.00	
		2016 Accrued Penalty			\$0.00		11/14/2027			-	\$0.00	
		2016 Accrued Interest			\$0.00		11/14/2027			-	\$0.00	
		2016 Total IA Payments									\$0.00	
2015		· ·										
	150	Tax return filed	11/14/2016	\$64,752.00	\$0.00	)	11/15/2026	11/14/2026	C	) -	\$0.00	
	276	Penalty for late payment of tax	11/14/2016	\$806.70	\$0.00			11/14/2026		) -	\$0.00	
	176	Penalty for not pre-paying tax	11/14/2016	\$424.17	\$0.00			11/14/2026	C	) -	\$0.00	
		Interest charged for late payment	11/14/2016	\$477.30	\$0.00			11/14/2026	C	) -	\$0.00	
		2015 Reversed Credits/Other	.,,.,,2310	<b>\$1.7.100</b>	\$0.00		11/15/2026	,, 2320		-	\$0.00	
		2015 Accrued Penalty			\$0.00		11/15/2026			-	\$0.00	
		2015 Accrued Interest			\$0.00		11/15/2026			-	\$0.00	
		2015 Total IA Payments			\$5.00		, 10, 2020				\$0.00	
2014		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,									ψ0.00	
	150	Tax return filed	11/2/2015	\$50,818.00	\$39,712.80	30	12/3/2025	12/2/2025	C	) 3	\$13,392.78	\$13,415.06
		Penalty for late payment of tax	11/2/2015	\$1,542.55	\$1,542.55		12/3/2025				\$520.21	\$521.08

				Ontain		Fating at a d	Estimated			Manatha	Estimated IA	Estimated IA
				Original Assessed	Remaining	Estimated Total Tolling	THS Calculated		CSED Days	Months Until	Payments CSED (Including Daily	Payments 72 Mths (Including Daily
Year	Code	Assessment	Date	Amount	Balance	Days	CSED	IRS CSED	Variation			
2014												
		Penalty for not pre-paying tax	11/2/2015	\$791.00	\$791.00							\$267.20
		Interest charged for late payment	11/2/2015	\$734.12	\$734.12			12/2/2025	0			
		Fees and other expenses for collection	2/15/2016	\$4.50	\$4.50		3/18/2026			7	<b>#</b> 0100	
		Additional tax assessed	2/15/2016	\$7,345.00	\$7,345.00		3/18/2026		0		Ψ1,070.70	\$1,077.54
		Penalty for late payment of tax Interest charged for late payment	7/6/2020	\$11,311.89	\$11,311.89		3/18/2026			7	\$ 1,00 HOE	\$1,659.50
		Interest charged for late payment	7/6/2020	\$12,897.32	\$12,897.32		3/18/2026			7	7 1,000.01	\$1,892.09
		2014 Reversed Credits/Other	7/11/2022	\$5,156.45	\$5,156.45		3/18/2026	UK		/	Ψ100.71	\$756.47
		2014 Accrued Penalty			\$0.00 \$0.00		3/18/2026 3/18/2026			-	\$0.00	
		2014 Accrued Interest			\$0.00		3/18/2026			-	\$0.00 7 \$3,050.61	\$3,060.73
		2014 Accided interest 2014 Total IA Payments			\$20,863.25		3/18/2026			/	\$3,050.61	\$3,000.73
2013		2014 Total IAT ayments									\$22,040.41	
2013	150	Tax return filed	11/24/2014	\$73,127.00	\$0.00	30	12/25/2024	12/24/2024	0	_	\$0.00	
		Penalty for late payment of tax	11/24/2014	\$2,696.96	\$0.00			12/24/2024	0		\$0.00	
		Penalty for not pre-paying tax	11/24/2014	\$969.00	\$0.00		12/25/2024		0		\$0.00	
		Interest charged for late payment	11/24/2014	\$1,247.14	\$0.00			12/24/2024	0		\$0.00	
		Additional tax assessed	2/15/2014	\$703.00	\$0.00	30	3/18/2026				\$0.00	
	_, _	Penalty for late payment of tax	7/6/2020	\$14,334.82	\$0.00		3/18/2026		U	_	\$0.00	
		Interest charged for late payment	7/6/2020	\$19,679.12	\$0.00		3/18/2026				\$0.00	
		Interest charged for late payment	7/11/2022	\$7,014.31	\$0.00		3/18/2026			_	\$0.00	
		2013 Reversed Credits/Other	771172022	Ψ7,014.51	\$0.00		3/18/2026	ar.		_	\$0.00	
		2013 Accrued Penalty			\$0.00		3/18/2026			_	\$0.00	
		2013 Accrued Interest			\$0.00		3/18/2026			-	\$0.00	
		2013 Total IA Payments			Ψ0.00		0/ 10/2020				\$0.00	
2012		,									40.00	
	150	Tax return filed	11/25/2013	\$44,169.00	\$0.00	30	12/26/2023	12/25/2023	0	-	\$0.00	
		Penalty for late payment of tax	11/25/2013	\$1,466.75	\$0.00	- 00		12/25/2023	0		\$0.00	
		Penalty for not pre-paying tax	11/25/2013	\$737.00	\$0.00		12/26/2023		0	-	\$0.00	
		Interest charged for late payment	11/25/2013	\$671.38	\$0.00			12/25/2023	0	-	\$0.00	
		Penalty for late payment of tax	7/7/2014	\$1,895.99	\$0.00		12/26/2023			-	\$0.00	
	196	Interest charged for late payment	7/7/2014	\$595.40	\$0.00		12/26/2023			-	\$0.00	
	276	Penalty for late payment of tax	7/6/2020	\$4,229.50	\$0.00		12/26/2023	uk		-	\$0.00	
	196	Interest charged for late payment	7/6/2020	\$9,804.32	\$0.00		12/26/2023			-	\$0.00	
	196	Interest charged for late payment	7/11/2022	\$3,004.80	\$0.00		12/26/2023	uk		-	\$0.00	
		2012 Reversed Credits/Other			\$0.00		12/26/2023			-	\$0.00	
		2012 Accrued Penalty			\$0.00		12/26/2023			-	\$0.00	
		2012 Accrued Interest			\$0.00		12/26/2023			-	\$0.00	
		2012 Total IA Payments									\$0.00	
2011												
		Tax return filed	11/19/2012	\$36,973.00	\$0.00		1/19/2023				\$0.00	
		Penalty for late payment of tax	11/19/2012	\$1,478.92	\$0.00		1/19/2023				\$0.00	
	170	Penalty for not pre-paying tax	11/19/2012	\$510.00	\$0.00						\$0.00	
		Interest charged for late payment	11/19/2012	\$666.57	\$0.00		1/19/2023		0	-	\$0.00	
	276	Penalty for late payment of tax	7/7/2014	\$2,680.54	\$0.00		1/19/2023	uk		-	\$0.00	

Year 2011	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)**
2011	106	Interest charged for late payment	7/7/2014	\$1,985.70	\$0.00		1/19/2023	Ruk		_	\$0.00	
		Fees and other expenses for collection	9/28/2015	\$4.50	\$0.00		1/19/2023			_	\$0.00	
		Penalty for late payment of tax	7/6/2020	\$5,083.78	\$0.00		1/19/2023			_	\$0.00	
		Interest charged for late payment	7/6/2020	\$7,441.20	\$0.00		1/19/2023			_	\$0.00	
		Interest charged for late payment	7/5/2021	\$166.05	\$0.00		1/19/2023			_	\$0.00	
		2011 Reversed Credits/Other	11312021	Ψ100.03	\$0.00		1/19/2023			_	\$0.00	
		2011 Accrued Penalty			\$0.00		1/19/2023				\$0.00	
		2011 Accrued Interest			\$0.00		1/19/2023			_	\$0.00	
		2011 Total IA Payments			\$0.00		1/17/2023	,		-	\$0.00	
2010		2011 Total IAT dyllichts									\$0.00	
2010	150	Tax return filed	11/21/2011	\$23,327.00	\$0.00	60	1/21/2022	2/11/2025	1117		\$0.00	
		Penalty for late payment of tax	11/21/2011	\$926.40	\$0.00		1/21/2022		1117		\$0.00	
		Penalty for not pre-paying tax	11/21/2011	\$497.00	\$0.00				1117		\$0.00	
		Interest charged for late payment	11/21/2011	\$531.36	\$0.00			2/11/2025	1117		\$0.00	
		Fees and other expenses for collection	4/9/2012	\$4.50	\$0.00		1/21/2022		1117	-	\$0.00	
		Penalty for late payment of tax	7/7/2014	\$2,431.80	\$0.00		1/21/2022			-	\$0.00	
		Interest charged for late payment	7/7/2014	\$2,431.60	\$0.00		1/21/2022			-	\$0.00	
		Penalty for late payment of tax	7/6/2020	\$2,037.09	\$0.00		1/21/2022			-	\$0.00	
		Interest charged for late payment	7/6/2020	\$8,405.66	\$0.00		1/21/2022			-	\$0.00	
		Interest charged for late payment	7/11/2022				1/21/2022			-	\$0.00	
		2010 Reversed Credits/Other	7/11/2022	\$2,650.09	\$0.00 \$0.00		1/21/2022			-		
		2010 Accrued Penalty					1/21/2022			-	\$0.00	
		2010 Accrued Interest			\$0.00					-	\$0.00	
					\$0.00		1/21/2022	<u></u>		-	\$0.00	
2009		2010 Total IA Payments									\$0.00	
2009	450	Tay ratura filed	44 /00 /0040	<b>\$00.050.00</b>	407.040.E/	450	4 /00 /0004	4 /00 /0005	1110	0	40.00	
		Tax return filed	11/22/2010	\$90,052.00	\$87,810.56							
		Penalty for late payment of tax	11/22/2010	\$3,597.36	\$3,597.36		4/22/2021		1469			
		Penalty for not pre-paying tax	11/22/2010	\$2,153.00	\$2,153.00				1469		7	
		Interest charged for late payment	11/22/2010	\$2,204.60	\$2,204.60		4/22/2021		1469			
		Additional tax assessed	3/12/2012	\$12,614.00	\$12,614.00				1427			
		Miscellaneous penalty 04-08-2026 IRC	3/12/2012	\$2,521.00	\$2,521.00				1427			
		Penalty for late payment of tax	7/7/2014	\$20,488.10	\$20,488.10		5/12/2022			0		
		Interest charged for late payment	7/7/2014	\$14,098.24	\$14,098.24		5/12/2022			0		
		Penalty for late payment of tax	7/6/2020	\$1,549.28	\$1,549.28		5/12/2022			0		
		Interest charged for late payment	7/6/2020	\$41,902.64	\$41,902.64		5/12/2022			0		
		Interest charged for late payment	7/11/2022	\$12,518.04	\$12,518.04		5/12/2022			0	7	
		2009 Reversed Credits/Other			\$0.00		5/12/2022			-	\$0.00	
		2009 Accrued Penalty			\$0.00		5/12/2022			-	\$0.00	
		2009 Accrued Interest			\$50,742.00		5/12/2022			0	<b>#0100</b>	
		2009 Total IA Payments									\$0.00	

#### **CSED TOLLING CALCULATIONS**

ear	Code	Explanation of Transaction	Start Date	End Date	End Code	Tolling Days	Additional Tolling Days	Total Days
2025								
		No Tolling Events Found						
2024								
		No Tolling Events Found						
2023								
		No Tolling Events Found						
2022								
		No Tolling Events Found						
2021								
		No Tolling Events Found						
2020								
		No Tolling Events Found						
2019								
		No Tolling Events Found						
2018								
		No Tolling Events Found						
2017								
	971	No longer in installment agreement status	12/17/2018	12/17/2018		0	30	30
2016								
		No Tolling Events Found						
2015								
		No Tolling Events Found						
2014								
	971	No longer in installment agreement status	2/11/2019	2/11/2019		0	30	30
2013								
	971	No longer in installment agreement status	2/11/2019	2/11/2019		0	30	30
2012								
	971	No longer in installment agreement status	2/11/2019	2/11/2019		0	30	30
2011								
		Pending installment agreement	1/16/2013	1/16/2013	972			reversed
		No longer in installment agreement status	9/2/2013	9/2/2013		0	30	30
	971	No longer in installment agreement status	2/11/2019	2/11/2019		0	30	30
2010								
		Pending installment agreement	1/30/2012	1/30/2012	972			reversed
		Pending installment agreement	1/16/2013					?
		No longer in installment agreement status	9/2/2013	9/2/2013		0	30	30
	971	No longer in installment agreement status	2/11/2019	2/11/2019		0	30	30
2009								
	971	Pending installment agreement	1/11/2011	4/11/2011	971	90	0	90

<sup>? =</sup> 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 (cont.)

Year	Code	Explanation of Transaction	Start Date	End Date	End Code	Tolling Days	Additional Tolling Days	Total Days
2009								
	971	Pending installment agreement	1/30/2012					?
	971	Pending installment agreement	1/16/2013					?
	971	No longer in installment agreement status	9/2/2013	9/2/2013		0	30	30
	971	No longer in installment agreement status	2/11/2019	2/11/2019		0	30	30

<sup>? =</sup> 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**

ax Year	Notice Number	Notice Issued	Date
2023			
	CP 0030	Notice issued	11/11/202
2022			
	CP 0030	Notice issued	11/6/202
	CP 0049	Notice issued	11/6/202
2021			
	CP 0030	Notice issued	11/7/202
2020			
	CP 0023	Notice issued	11/8/202
2019			
	CP 0049	Notice issued	11/2/202
2018	3		
	CP 0049	Notice issued	11/4/201
2017	7		
	CP 0014	Notice issued	11/5/201
2016	6		
	CP 0024	Notice issued	11/13/201
	CP 0049	Notice issued	11/13/201
2015	5		
	CP 0030	Notice issued	11/14/201
	CP 0049	Notice issued	12/19/201
2014	1		
	CP 0014	Notice issued	11/2/201
		Issued notice of lien filing and right to Collection Due Process hearing	12/29/201
		Passport certified seriously delinquent tax debt	2/25/201
		Passport certified seriously delinquent tax debt	3/4/201
	CP 071C	Notice issued	7/6/202
	CP 071C	Notice issued	7/11/202
2013	3		
	CP 0023	Notice issued	11/24/201
		Collection due process Notice of Intent to Levy issued	7/22/201
		Issued notice of lien filing and right to Collection Due Process hearing	9/8/201
	CP 071C	Notice issued	7/6/202
	CP 071C	Notice issued	7/11/202
	CP 0049	Notice issued	3/24/202
	CP 0049	Notice issued	4/21/202
2012	2		
	CP 0023	Notice issued	11/25/201
	CP 071C	Notice issued	7/7/201
		Collection due process Notice of Intent to Levy issued	7/22/201
		Issued notice of lien filing and right to Collection Due Process hearing	9/8/201
		Passport certified seriously delinquent tax debt	2/25/201
		Passport certified seriously delinquent tax debt	3/4/201
	CP 071C	Notice issued	7/6/202

# IRS NOTICES (cont.)

Tax Year	Notice Number	Notice Issued	Date
2012			=////
	CP 071C	Notice issued	7/11/2022
		Passport certified seriously delinquent tax debt reversal	1/8/2024
2011			
	CP 0014	Notice issued	11/19/2012
	CP 071C	Notice issued	7/7/2014
		Collection due process Notice of Intent to Levy issued	7/22/2015
		Issued notice of lien filing and right to Collection Due Process hearing	9/8/2015
		Passport certified seriously delinquent tax debt	2/25/2019
		Passport certified seriously delinquent tax debt	3/4/2019
	CP 071C	Notice issued	7/6/2020
	CP 0049	Notice issued	7/5/2021
		Passport certified seriously delinquent tax debt reversal	7/12/2021
	CP 0049	Notice issued	8/9/2021
	CP 0049	Notice issued	9/6/2021
2010			
	CP 0014	Notice issued	11/21/2011
		Issued notice of lien filing and right to Collection Due Process hearing	3/20/2012
	CP 071C	Notice issued	7/7/2014
		Collection due process Notice of Intent to Levy issued	7/22/2015
		Passport certified seriously delinquent tax debt	2/25/2019
		Passport certified seriously delinquent tax debt	3/4/2019
	CP 071C	Notice issued	7/6/2020
	CP 071C	Notice issued	7/11/2022
		Passport certified seriously delinquent tax debt reversal	2/24/2025
2009		- dosportos inica concast, com quent tan acces revelos.	_,,_
	CP 0014	Notice issued	11/22/2010
	G. 55	Issued notice of lien filing and right to Collection Due Process hearing	4/26/2011
		Review of unreported income	2/27/2012
	CP 0021	Notice issued	3/12/2012
	CP 071C	Notice issued	7/7/2014
	0. 07 10	Collection due process Notice of Intent to Levy issued	7/22/2015
		Passport certified seriously delinquent tax debt	3/4/2019
	CP 071C	Notice issued	7/6/2020
	CP 071C	Notice issued	7/11/2022

## 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).
CP23	We made changes to your return because we found a difference between the amount of estimated tax payments on your tax return and the amount we posted to your account. You have a balance due because of these changes.
CP24	We made changes to your return because we found a difference between the amount of estimated tax payments on your tax return and the amount we posted to your account. You have a potential overpayment credit because of these changes.
CP30	You received a CP30 Notice to inform you that we charged you a penalty for not pre-paying enough of your tax either by having taxes withheld from your income, or by making timely estimated tax payments.
CP49	If you received an IRS CP49 Notice, the IRS used all or part of your refund to pay a tax debt.

#### IRS ACCOUNT SUMMARY

Tax Year	Code	Explanation of Transaction	Date	Amount
2025				
		No tax return filed		
	660	Estimated tax payment	2/28/2025	(\$25,000)
	660	Estimated tax payment	3/31/2025	(\$25,000)
	660	Estimated tax payment	4/30/2025	(\$25,000)
	660	Estimated tax payment	5/30/2025	(\$25,000)
	960	Appointed representative	6/9/2025	\$0
	660	Estimated tax payment	6/30/2025	(\$25,000)
2024				
		No tax return filed		
	960	Appointed representative	6/10/2024	\$0
	660	Estimated tax payment	8/5/2024	(\$25,000)
	660	Estimated tax payment	8/30/2024	(\$25,000)
	660	Estimated tax payment	9/30/2024	(\$25,000)
	660	Estimated tax payment	10/31/2024	(\$25,000)
	660	Estimated tax payment	12/31/2024	(\$25,000)
	660	Estimated tax payment	1/31/2025	(\$25,000)
	460	Extension of time to file tax return	4/12/2025	\$0
2023				**
	660	Estimated tax payment	4/28/2023	(\$25,000)
	660	Estimated tax payment	5/31/2023	(\$25,000)
	960	Appointed representative	6/5/2023	\$0
	660	Estimated tax payment	6/30/2023	(\$25,000)
	660	Estimated tax payment	7/31/2023	(\$25,000)
	660	Estimated tax payment	8/31/2023	(\$25,000)
	660	Estimated tax payment	9/29/2023	(\$25,000)
	660	Estimated tax payment	10/31/2023	(\$25,000)
	660	Estimated tax payment	1/16/2024	(\$54,000)
	660	Estimated tax payment	1/16/2024	(\$30,000)
	660	Estimated tax payment	4/12/2024	(\$60,000)
	460	Extension of time to file tax return	4/15/2024	\$0
	670	Payment	10/15/2024	(\$55,080)
	670	Payment	10/15/2024	(\$15,000)
	150	Tax return filed	11/11/2024	\$378,844
	176	Penalty for not pre-paying tax 11-11-2034	11/11/2024	\$6,184
	196	Interest charged for late payment	11/11/2024	\$185
	196	Interest charged for late payment	11/11/2024	\$2,257
	276	Penalty for late payment of tax	11/11/2024	\$1,795
	971	Notice issued CP 0030	11/11/2024	ψ1,793 \$0
	670	Payment	12/23/2024	(\$187)
	196	Interest charged for late payment	2/10/2025	\$2
2022	190	interest onarged for late payment	2/10/2025	Φ2
2022	660	Estimated tax payment	4/20/2022	(¢15,000)
	660	Estimated tax payment	4/29/2022	(\$15,000) (\$15,000)
	660	Estimated tax payment	5/31/2022	(\$15,000) (\$15,000)
	660	Estimated tax payment	6/30/2022	(\$15,000)
	660	Estimated tax payment	7/29/2022	(\$25,000)
	660	Estimated tax payment	8/31/2022	(\$25,000)
	660	Estimated tax payment	9/30/2022	(\$25,000)
	660	Estimated tax payment	10/31/2022	(\$25,000)
	660	Estimated tax payment	11/30/2022	(\$25,000)

Tax Year	Code	Explanation of Transaction	Date	Amount
2022				
	660	Estimated tax payment	12/30/2022	(\$25,000
	660	Estimated tax payment	1/31/2023	(\$25,000
	670	Payment	2/15/2023	(\$1,090
	660	Estimated tax payment	2/28/2023	(\$25,000
	960	Appointed representative	3/10/2023	\$(
	660	Estimated tax payment	3/31/2023	(\$25,000
	460	Extension of time to file tax return	4/12/2023	\$(
	660	Estimated tax payment	4/18/2023	(\$40,000
	670	Payment	10/13/2023	(\$70,000
	670	Payment	10/16/2023	(\$6,583
	826	Credit transferred out to 30 20121231	10/16/2023	\$1,757
	150	Tax return filed	11/6/2023	\$379,079
	176	Penalty for not pre-paying tax 11-06-2033	11/6/2023	\$2,370
	196	Interest charged for late payment	11/6/2023	\$2,427
	276	Penalty for late payment of tax	11/6/2023	\$2,040
	971	Notice issued CP 0030	11/6/2023	\$(
	971	Notice issued CP 0049	11/6/2023	\$(
2021	371	Notice issued of 6045	11/0/2020	Ψ
	290	Additional tax assessed	4/5/2021	\$(
	290	Additional tax assessed	7/19/2021	\$(
	660	Estimated tax payment	7/30/2021	(\$10,000
	660	Estimated tax payment	8/31/2021	(\$10,000
	290	Additional tax assessed	9/20/2021	(ψ10,000 \$(
	660	Estimated tax payment	9/30/2021	(\$10,000
	660	Estimated tax payment	10/29/2021	(\$10,000
	290	Additional tax assessed	11/15/2021	\$(\$10,000 \$(
	290	Additional tax assessed  Additional tax assessed	11/22/2021	\$(
	660	Estimated tax payment	11/30/2021	(\$12,000
	660		12/31/2021	(\$12,000
	660	Estimated tax payment Estimated tax payment	1/31/2022	(\$12,000
	660		2/28/2022	•
	660	Estimated tax payment		(\$12,000
	660	Estimated tax payment	3/31/2022	(\$15,000
	460	Estimated tax payment  Extension of time to file tax return	4/7/2022	(\$130,000
			4/10/2022	(\$10,000
	660	Estimated tax payment	8/31/2022	(\$10,000 (\$22,131
	670	Payment Tax return filed	10/11/2022	
	150		11/7/2022	\$263,465
	176	Penalty for not pre-paying tax 11-07-2032	11/7/2022	\$1,556
	196	Interest charged for late payment	11/7/2022	\$641
	276	Penalty for late payment of tax  Notice issued CP 0030	11/7/2022	\$864
	971		11/7/2022	\$(*4.206
	670	Payment Appainted representative	12/8/2022	(\$1,396
2020	960	Appointed representative	3/10/2023	\$(
	290	Additional tax assessed	6/1/2020	\$(
	960	Appointed representative	6/8/2020	\$(
	660	Estimated tax payment	7/28/2020	(\$7,500
	660	Estimated tax payment	8/28/2020	(\$7,500
	660	Estimated tax payment	9/29/2020	(\$7,500
	660	Estimated tax payment	10/30/2020	(\$7,500

Tax Year	Code	Explanation of Transaction	Date	Amount
2020				
	660	Estimated tax payment	11/30/2020	(\$7,500)
	660	Estimated tax payment	12/31/2020	(\$7,500)
	290	Additional tax assessed	1/18/2021	\$0
	660	Estimated tax payment	1/29/2021	(\$7,500)
	660	Estimated tax payment	2/26/2021	(\$7,500)
	660	Estimated tax payment	3/31/2021	(\$10,000)
	660	Estimated tax payment	4/15/2021	(\$10,000)
	460	Extension of time to file tax return	5/13/2021	\$0
	660	Estimated tax payment	5/17/2021	(\$12,500)
	660	Estimated tax payment	5/28/2021	(\$10,000)
	660	Estimated tax payment	6/30/2021	(\$10,000)
	670	Payment	10/6/2021	(\$9,774)
	150	Tax return filed	11/8/2021	\$120,744
	176	Penalty for not pre-paying tax 11-08-2031	11/8/2021	\$1,131
	196	Interest charged for late payment	11/8/2021	\$43
	196	Interest charged for late payment	11/8/2021	\$100
	276	Penalty for late payment of tax	11/8/2021	\$356
	971	Notice issued CP 0023	11/8/2021	\$0
	670	Payment	1/7/2022	(\$100)
	196	Interest charged for late payment	2/14/2022	\$0
2019				
	960	Appointed representative	10/28/2019	\$0
	660	Estimated tax payment	11/7/2019	(\$2,500)
	660	Estimated tax payment	12/9/2019	(\$2,500)
	660	Estimated tax payment	12/27/2019	(\$2,500
	660	Estimated tax payment	1/6/2020	(\$5,000
	660	Estimated tax payment	1/6/2020	(\$2,500
	660	Estimated tax payment	1/27/2020	(\$5,000
	660	Estimated tax payment	2/3/2020	(\$5,000
	660	Estimated tax payment	2/24/2020	(\$5,000
	662	Removed estimated tax payment	3/4/2020	\$5,000
	663	Estimated tax payment	3/4/2020	(\$5,000)
	660	Estimated tax payment	3/6/2020	(\$5,000)
	660	Estimated tax payment	3/24/2020	(\$5,000)
	660	Estimated tax payment	4/14/2020	(\$10,000)
	460	Extension of time to file tax return	4/15/2020	\$0
	670	Payment	10/13/2020	(\$55,790
	670	Payment	10/13/2020	(\$805
	826	Credit transferred out to 30 20111231	10/13/2020	\$9
	150	Tax return filed	11/2/2020	\$104,673
	170	Penalty for not pre-paying tax 11-02-2030	11/2/2020	\$688
	196	Interest charged for late payment	11/2/2020	\$405
	276	Penalty for late payment of tax	11/2/2020	\$820
	971	Notice issued CP 0049	11/2/2020	\$(
2018			,_,	Ψ
	660	Estimated tax payment	1/28/2019	(\$2,500
	660	Estimated tax payment	1/31/2019	(\$2,500)
	660	Estimated tax payment	2/26/2019	(\$2,500)
	460	Extension of time to file tax return	4/14/2019	\$(\psi_2,300
	670	Payment	4/14/2019	(\$8,850)

Tax Year	Code	Explanation of Transaction	Date	Amount
2018				
	660	Estimated tax payment	4/15/2019	(\$7,500)
	660	Estimated tax payment	6/17/2019	(\$5,000)
	660	Estimated tax payment	7/5/2019	(\$2,500)
	660	Estimated tax payment	8/28/2019	(\$2,500)
	660	Estimated tax payment	8/30/2019	(\$2,500)
	826	Credit transferred out to 30 20111231	8/30/2019	\$585
	670	Payment	9/17/2019	(\$2,500)
	826	Credit transferred out to 30 20111231	9/17/2019	\$2,500
	960	Appointed representative	10/28/2019	\$0
	150	Tax return filed	11/4/2019	\$34,377
	170	Penalty for not pre-paying tax 11-04-2029	11/4/2019	\$1,051
	196	Interest charged for late payment	11/4/2019	\$149
	276	Penalty for late payment of tax	11/4/2019	\$188
	971	Notice issued CP 0049	11/4/2019	\$0
2017				
	960	Appointed representative	6/5/2017	\$0
	460	Extension of time to file tax return	4/15/2018	\$0
	806	W-2 or 1099 withholding	4/15/2018	(\$66)
	660	Estimated tax payment	6/4/2018	(\$10,000)
	660	Estimated tax payment	6/5/2018	(\$10,000)
	660	Estimated tax payment	6/6/2018	(\$10,000)
	660	Estimated tax payment	6/7/2018	(\$10,000)
	670	Payment	10/12/2018	(\$10,772)
	150	Tax return filed	11/5/2018	\$49,206
	176	Penalty for not pre-paying tax 12-05-2028	11/5/2018	\$932
	196	Interest charged for late payment	11/5/2018	\$26
	196	Interest charged for late payment	11/5/2018	\$490
	276	Penalty for late payment of tax	11/5/2018	\$674
	971	Notice issued CP 0014	11/5/2018	\$0
	971	Installment agreement established	11/17/2018	\$0
	670	Payment	11/19/2018	(\$490)
	971	No longer in installment agreement status	12/17/2018	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
2016		The state of the s	5, 10, 202	
	430	Estimated tax payment	4/15/2016	(\$1,829)
	960	Appointed representative	6/6/2016	\$0
	430	Estimated tax payment	6/15/2016	(\$1,216)
	430	Estimated tax payment	1/13/2017	(\$3,159)
	460	Extension of time to file tax return	4/13/2017	\$0
	806	W-2 or 1099 withholding	4/15/2017	(\$690)
	660	Estimated tax payment	6/29/2017	(\$10,000)
	660	Estimated tax payment	7/26/2017	(\$10,000)
	670	Payment	9/19/2017	(\$2,500)
	670	Payment	9/25/2017	(\$2,500)
	670	Payment	10/4/2017	(\$2,500)
	670	Payment	10/6/2017	(\$2,500)
	670	Payment	10/11/2017	(\$5,000)
	670	Payment	10/11/2017	(\$2,000)
	670	Payment	10/12/2017	(\$2,000)

Tax Year	Code	Explanation of Transaction	Date	Amount
2016				
	670	Payment	10/13/2017	(\$7,500)
	670	Payment	10/15/2017	(\$6,650)
	670	Payment	10/15/2017	(\$5,250)
	670	Payment	10/16/2017	(\$8,033)
	826	Credit transferred out to 30 20111231	10/16/2017	\$81
	150	Tax return filed	11/13/2017	\$75,598
	170	Penalty for not pre-paying tax 11-13-2027	11/13/2017	\$1,577
	196	Interest charged for late payment	11/13/2017	\$1,159
	276	Penalty for late payment of tax	11/13/2017	\$1,811
	971	Notice issued CP 0024	11/13/2017	\$0
	971	Notice issued CP 0049	11/13/2017	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
2015				
	430	Estimated tax payment	4/15/2015	(\$1,754)
	430	Estimated tax payment	6/14/2015	(\$1,257)
	960	Appointed representative	8/20/2015	\$0
	660	Estimated tax payment	9/4/2015	(\$5,000)
	660	Estimated tax payment	9/14/2015	(\$2,000)
	430	Estimated tax payment	9/16/2015	(\$1,844)
	660	Estimated tax payment	9/21/2015	(\$2,000)
	660	Estimated tax payment	9/25/2015	(\$3,600)
	660	Estimated tax payment	10/27/2015	(\$1,000)
	660	Estimated tax payment	10/30/2015	(\$1,000)
	660	Estimated tax payment	11/4/2015	(\$1,000)
	660	Estimated tax payment	11/17/2015	(\$1,000)
	660	Estimated tax payment	12/16/2015	(\$3,000)
	430		1/15/2016	
	660	Estimated tax payment	2/29/2016	(\$2,548)
		Estimated tax payment  Extension of time to file tax return		(\$900)
	460		4/15/2016	\$0
	806	W-2 or 1099 withholding	4/15/2016	(\$458)
	670	Payment	4/20/2016	(\$9,500)
	610	Payment with return	10/24/2016	(\$28,737)
	826	Credit transferred out to 29 20081231	10/24/2016	\$55
	826	Credit transferred out to 30 20111231	10/24/2016	\$84
	150	Tax return filed	11/14/2016	\$64,752
	176	Penalty for not pre-paying tax 11-14-2026	11/14/2016	\$424
	196	Interest charged for late payment	11/14/2016	\$477
	276	Penalty for late payment of tax	11/14/2016	\$807
	570	Additional account action pending	11/14/2016	\$C
	971	Notice issued CP 0030	11/14/2016	\$0
	571	Resolved additional account action	12/19/2016	\$0
	971	Notice issued CP 0049	12/19/2016	\$0
	961	Removed appointed representative	8/1/2022	\$0
0011	960	Appointed representative	3/10/2023	\$0
2014				
	430	Estimated tax payment	4/12/2014	(\$1,488)
	430	Estimated tax payment	6/14/2014	(\$1,029)
	430	Estimated tax payment	9/15/2014	(\$1,750)
	430	Estimated tax payment	1/15/2015	(\$2,478)

Tax Year	Code	Explanation of Transaction	Date	Amount
2014				
	460	Extension of time to file tax return	4/14/2015	\$0
	960	Appointed representative	8/20/2015	\$0
	150	Tax return filed	11/2/2015	\$50,818
	170	Penalty for not pre-paying tax 12-02-2025	11/2/2015	\$791
	196	Interest charged for late payment	11/2/2015	\$734
	276	Penalty for late payment of tax	11/2/2015	\$1,543
	971	Notice issued CP 0014	11/2/2015	\$0
	582	Lien placed on assets due to balance owed	12/25/2015	\$0
	971	Issued notice of lien filing and right to Collection Due Process hearing	12/29/2015	\$0
	290	Additional tax assessed 03-17-2026	2/15/2016	\$7,345
	360	Fees and other expenses for collection	2/15/2016	\$5
	971	Installment agreement established	3/9/2016	\$0
	971	Installment agreement established	3/17/2016	\$0
	971	No longer in installment agreement status	2/11/2019	\$0
	971	Tax period blocked from automated levy program	2/18/2019	\$0
	971	Passport certified seriously delinquent tax debt	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	3/4/2019	\$0
	196	Interest charged for late payment	7/6/2020	\$12,897
	276	Penalty for late payment of tax	7/6/2020	\$11,312
	971	Notice issued CP 071C	7/6/2020	\$0
	196	Interest charged for late payment	7/11/2022	\$5,156
	971	Notice issued CP 071C	7/11/2022	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
	670	Payment	4/15/2025	(\$1,090)
	670	Payment	5/15/2025	(\$1,090)
	670	Payment	6/13/2025	(\$1,090)
	670	Payment	7/15/2025	(\$1,090)
2013	070	rayment	1/13/2023	(ψ1,090)
2010	430	Estimated tax payment	1/16/2014	(\$703)
	660	Estimated tax payment Estimated tax payment	2/5/2014	(\$703) (\$5,000)
	460	Extension of time to file tax return	4/12/2014	(\$5,000) \$0
	150	Tax return filed		
	170		11/24/2014 11/24/2014	\$73,127
		Penalty for not pre-paying tax 12-24-2024		\$969
	196	Interest charged for late payment	11/24/2014	\$1,247 \$2,607
	276	Penalty for late payment of tax  Notice issued CP 0023	11/24/2014 11/24/2014	\$2,697
	971			\$0
	971	Collection due process Notice of Intent to Levy issued	7/22/2015	\$0
	971	Collection due process Notice of Intent to Levy refused or unclaimed	8/19/2015	\$0
	960	Appointed representative	8/20/2015	\$0
	582	Lien placed on assets due to balance owed	9/4/2015	\$0
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/8/2015	\$0
	971	Federal Payment Levy Program - Levy Issued	10/26/2015	\$0
	290	Additional tax assessed 03-17-2026	2/15/2016	\$703
	971	Installment agreement established	3/9/2016	\$0
	971	Installment agreement established	3/17/2016	\$0
	971	No longer in installment agreement status	2/11/2019	\$0
	971	Tax period blocked from automated levy program	2/18/2019	\$0
	196	Interest charged for late payment	7/6/2020	\$19,679
	276	Penalty for late payment of tax	7/6/2020	\$14,335

Tax Year	Code	Explanation of Transaction	Date	Amount
2013				
	971	Notice issued CP 071C	7/6/2020	\$0
	196	Interest charged for late payment	7/11/2022	\$7,014
	971	Notice issued CP 071C	7/11/2022	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
	670	Payment	4/14/2023	(\$1,090
	670	Payment	5/15/2023	(\$1,090
	670	Payment	6/15/2023	(\$1,090
	670	Payment	7/14/2023	(\$1,090
	670	Payment	8/15/2023	(\$1,090
	670	Payment	9/15/2023	(\$1,090
	670	Payment	10/13/2023	(\$1,090
	670	Payment	11/15/2023	(\$1,090
	670	Payment	12/15/2023	(\$1,090
	670	Payment	1/12/2024	(\$1,090
	670	Payment	2/15/2024	(\$1,090
	670	Payment	3/15/2024	(\$1,090
	670	Payment	4/15/2024	(\$1,090
	670	Payment	5/15/2024	(\$1,090
	670	Payment	6/14/2024	(\$1,090
	670	Payment	7/15/2024	(\$1,090
	670	Payment	8/15/2024	(\$1,090
	670	Payment	9/13/2024	(\$1,090
	670	Payment	10/15/2024	(\$1,090
	670	Payment	11/15/2024	(\$1,090
	670	Payment	12/13/2024	(\$1,090
	583	Removed lien	12/27/2024	\$(\psi 1,000
	670	Payment	1/15/2025	(\$1,090
	670	Payment	2/14/2025	(\$1,090
	826	Credit transferred out to 30 20091231	2/14/2025	\$1,024
	534	Write-off of balance due	3/10/2025	(\$90,023
	570	Additional account action pending	3/10/2025	(ψ90,023 \$(
	670	Payment Payment	3/14/2025	(\$1,090
	826	Credit transferred out to 30 20091231	3/14/2025	\$1,090
		Resolved additional account action		
	571 971	Notice issued CP 0049	3/24/2025 3/24/2025	\$( \$(
	570	Additional account action pending	4/7/2025	\$(
		Resolved additional account action	4/21/2025	\$(
	571 971	Notice issued CP 0049	4/21/2025	\$(
2012	9/1	INULIDE ISSUED OF UU48	4/21/2020	Φ
2012	460	Extension of time to file tax return	4/15/2012	\$(
	460	Extension of time to file tax return	4/15/2013	
	610	Payment with return	7/8/2013	(\$7,500
	660	Estimated tax payment	8/16/2013	(\$7,500 \$44.160
	150	Tax return filed	11/25/2013	\$44,169
	170	Penalty for not pre-paying tax 12-25-2023	11/25/2013	\$73
	196	Interest charged for late payment	11/25/2013	\$67
	276	Penalty for late payment of tax	11/25/2013	\$1,46
	971	Notice issued CP 0023	11/25/2013	\$(
	196	Interest charged for late payment	7/7/2014	\$595
	276	Penalty for late payment of tax	7/7/2014	\$1,89

Tax Year	Code	Explanation of Transaction	Date	Amount
2012				
	971	Notice issued CP 071C	7/7/2014	\$0
	971	Collection due process Notice of Intent to Levy issued	7/22/2015	\$0
	971	Collection due process Notice of Intent to Levy refused or unclaimed	8/19/2015	\$0
	960	Appointed representative	8/20/2015	\$0
	582	Lien placed on assets due to balance owed	9/4/2015	\$0
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/8/2015	\$0
	971	Federal Payment Levy Program - Levy Issued	10/26/2015	\$0
	971	Installment agreement established	3/9/2016	\$0
	971	Installment agreement established	3/17/2016	\$0
	971	No longer in installment agreement status	2/11/2019	\$0
	971	First Levy Issued on Module	2/18/2019	\$0
	971	Tax period blocked from automated levy program	2/18/2019	\$0
	971	Federal Payment Levy Program - Levy Issued	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	3/4/2019	\$0
	196	Interest charged for late payment	7/6/2020	\$9,804
	276	Penalty for late payment of tax	7/6/2020	\$4,230
	971	Notice issued CP 071C	7/6/2020	\$0
	670	Payment	9/15/2021	(\$1,090)
	670	Payment	10/13/2021	(\$1,090)
	670	Payment	11/15/2021	(\$1,090)
	670	Payment	12/15/2021	(\$1,090)
	670	Payment	1/14/2022	(\$1,090)
	670	Payment	2/15/2022	(\$1,090)
	670	Payment	3/15/2022	(\$1,090)
	670	Payment	4/15/2022	(\$1,090)
	670	Payment	5/13/2022	(\$1,090)
	670	Payment	6/15/2022	(\$1,090)
	196	Interest charged for late payment	7/11/2022	\$3,005
	971	Notice issued CP 071C	7/11/2022	\$0
	670	Payment	7/15/2022	(\$1,090)
	961	Removed appointed representative	8/1/2022	\$0
	670	Payment	8/15/2022	(\$1,090)
	670	Payment	9/15/2022	(\$1,090)
	670	Payment	10/14/2022	(\$1,090)
	670	Payment	11/15/2022	(\$1,090)
	670	Payment	12/15/2022	(\$1,090)
	670	Payment	1/13/2023	(\$1,090)
	960	Appointed representative	3/10/2023	\$0
	670	Payment	3/15/2023	(\$1,090)
	706	Credit transferred in from 30 20221231	10/16/2023	(\$1,757)
	608	Write-off of balance due -\$30,196.72	1/1/2024	(\$30,197)
	972	Passport certified seriously delinquent tax debt reversal	1/8/2024	\$0
	583	Removed lien	12/27/2024	\$0
2011				
	460	Extension of time to file tax return	4/15/2012	\$0
	960	Appointed representative	10/10/2012	\$0
	150	Tax return filed	11/19/2012	\$36,973
	170	Penalty for not pre-paying tax 01-18-2023	11/19/2012	\$510
	196	Interest charged for late payment	11/19/2012	\$667

Tax Year	Code	Explanation of Transaction	Date	Amount
2011				
	276	Penalty for late payment of tax	11/19/2012	\$1,479
	971	Notice issued CP 0014	11/19/2012	\$
	971	Installment agreement established	12/8/2012	\$
	971	Pending installment agreement	1/16/2013	\$
	972	Removed installment agreement	1/16/2013	\$
	971	No longer in installment agreement status	9/2/2013	\$
	196	Interest charged for late payment	7/7/2014	\$1,98
	276	Penalty for late payment of tax	7/7/2014	\$2,68
	971	Notice issued CP 071C	7/7/2014	\$
	971	Collection due process Notice of Intent to Levy issued	7/22/2015	\$
	971	Collection due process Notice of Intent to Levy refused or unclaimed	8/19/2015	\$
	582	Lien placed on assets due to balance owed	9/4/2015	\$
	971	Issued notice of lien filing and right to Collection Due Process hearing	9/8/2015	\$
	360	Fees and other expenses for collection	9/28/2015	\$
	971	Federal Payment Levy Program - Levy Issued	10/26/2015	\$
	971	Installment agreement established	3/9/2016	\$
	971	Installment agreement established	3/17/2016	\$
	670	Payment	5/16/2016	(\$1,038
	672	Removed payment 55 20160131 XXX-XX-4566	5/16/2016	\$5
	673	Payment Payment	5/16/2016	(\$52
	670	Payment	6/15/2016	(\$1,090
	670	Payment	7/15/2016	(\$1,090
	670	Payment	8/15/2016	(\$1,090
	670	Payment	9/15/2016	(\$1,090
	670	Payment	10/17/2016	(\$1,090
	706	Credit transferred in from 30 20151231	10/17/2016	(\$8 <sup>2</sup> )
	670		11/15/2016	(\$1,090
		Payment		
	670 670	Payment	12/15/2016	(\$1,090
		Payment	1/16/2017	(\$1,090
	670	Payment	2/15/2017	(\$1,090
	670	Payment	5/15/2017	(\$1,090
	670	Payment	6/15/2017	(\$1,090
	670	Payment	7/17/2017	(\$1,090
	670	Payment	8/15/2017	(\$1,090
	670	Payment	9/15/2017	(\$1,090
	670	Payment	10/16/2017	(\$1,090
	706	Credit transferred in from 30 20161231	10/16/2017	(\$8′
	670	Payment	11/15/2017	(\$1,090
	670	Payment	12/15/2017	(\$1,090
	670	Payment	1/15/2018	(\$1,090
	670	Payment	2/15/2018	(\$1,090
	670	Payment	3/15/2018	(\$1,090
	670	Payment	4/16/2018	(\$1,090
	670	Payment	5/15/2018	(\$1,090
	670	Payment	6/15/2018	(\$1,090
	670	Payment	7/16/2018	(\$1,09
	670	Payment	8/15/2018	(\$1,090
	670	Payment	9/17/2018	(\$1,090
	670	Payment	10/15/2018	(\$1,090
	670	Payment	11/15/2018	(\$1,090

Tax Year	Code	Explanation of Transaction	Date	Amount
2011				
	971	No longer in installment agreement status	2/11/2019	\$0
	971	First Levy Issued on Module	2/18/2019	\$0
	971	Tax period blocked from automated levy program	2/18/2019	\$0
	971	Federal Payment Levy Program - Levy Issued	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	3/4/2019	\$0
	706	Credit transferred in from 30 20181231	8/30/2019	(\$585)
	706	Credit transferred in from 30 20181231	9/17/2019	(\$2,500)
	670	Payment	10/15/2019	(\$1,090)
	670	Payment	11/15/2019	(\$1,090)
	670	Payment	12/13/2019	(\$1,090)
	670	Payment	1/15/2020	(\$1,090)
	670	Payment	2/14/2020	(\$1,090)
	670	Payment	3/13/2020	(\$1,090)
	670	Payment	4/15/2020	(\$1,090)
	670	Payment	5/15/2020	(\$1,090)
	670	Payment	6/29/2020	(\$1,090)
	196	Interest charged for late payment	7/6/2020	\$7,441
	276	Penalty for late payment of tax	7/6/2020	\$5,084
	971	Notice issued CP 071C	7/6/2020	\$0
	670	Payment	7/15/2020	(\$1,090)
	670	Payment	8/14/2020	(\$1,090)
	670	Payment	9/15/2020	(\$1,090)
	706	Credit transferred in from 30 20191231	10/13/2020	(\$9)
	670	Payment Payment	10/15/2020	(\$9) (\$1,090)
	670	Payment	11/13/2020	(\$1,090)
	670	Payment	12/15/2020	(\$1,090)
	670	Payment	1/15/2021	(\$1,090)
	670	Payment	2/12/2021	(\$1,090)
	670		3/15/2021	(\$1,090)
	670	Payment		
		Payment	4/15/2021 5/14/2021	(\$1,090)
	670	Payment		(\$1,090)
	670	Payment 20 20274224	6/15/2021	(\$1,090)
	826	Credit transferred out to 30 20071231	6/15/2021	\$716
	196	Interest charged for late payment	7/5/2021	\$166
	971	Notice issued CP 0049	7/5/2021	\$0
	972	Passport certified seriously delinquent tax debt reversal	7/12/2021	\$0
	670	Payment 000 00074004	7/15/2021	(\$1,090)
	826	Credit transferred out to 30 20071231	7/15/2021	\$1,090
	971	Notice issued CP 0049	8/9/2021	\$0
	670	Payment	8/13/2021	(\$1,090)
	826	Credit transferred out to 30 20071231	8/13/2021	\$1,090
	971	Notice issued CP 0049	9/6/2021	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
0040	583	Removed lien	12/27/2024	\$0
2010				
	460	Extension of time to file tax return	4/15/2011	\$0
	766	Credit to your account	4/15/2011	(\$167)
	150	Tax return filed	11/21/2011	\$23,327

Tax Year	Code	Explanation of Transaction	Date	Amount
2010				
	170	Penalty for not pre-paying tax 02-11-2025	11/21/2011	\$497
	196	Interest charged for late payment	11/21/2011	\$531
	276	Penalty for late payment of tax	11/21/2011	\$926
	971	Notice issued CP 0014	11/21/2011	\$0
	971	Installment agreement established	12/17/2011	\$0
	971	Pending installment agreement	1/30/2012	\$0
	972	Removed installment agreement	1/30/2012	\$0
	582	Lien placed on assets due to balance owed	3/16/2012	\$0
	971	Issued notice of lien filing and right to Collection Due Process hearing	3/20/2012	\$0
	360	Fees and other expenses for collection	4/9/2012	\$5
	960	Appointed representative	10/10/2012	\$0
	971	Pending installment agreement	1/16/2013	\$0
	971	No longer in installment agreement status	9/2/2013	\$0
	196	Interest charged for late payment	7/7/2014	\$2,058
	276	Penalty for late payment of tax	7/7/2014	\$2,432
	971	Notice issued CP 071C	7/7/2014	Ψ2, <del>1</del> 32
	971	Collection due process Notice of Intent to Levy issued	7/22/2015	\$0
	971			
	971	Collection due process Notice of Intent to Levy refused or unclaimed	8/19/2015	\$0 \$0
		Federal Payment Levy Program - Levy Issued	10/26/2015	
	971	Installment agreement established	3/9/2016	\$0
	971	Installment agreement established	3/17/2016	\$0
	971	No longer in installment agreement status	2/11/2019	\$0
	971	First Levy Issued on Module	2/18/2019	\$0
	971	Tax period blocked from automated levy program	2/18/2019	\$0
	971	Federal Payment Levy Program - Levy Issued	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	3/4/2019	\$0
	196	Interest charged for late payment	7/6/2020	\$8,406
	276	Penalty for late payment of tax	7/6/2020	\$2,432
	971	Notice issued CP 071C	7/6/2020	\$0
	583	Removed lien	12/24/2021	\$0
	196	Interest charged for late payment	7/11/2022	\$2,650
	971	Notice issued CP 071C	7/11/2022	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
	608	Write-off of balance due -\$43,096.30	2/17/2025	(\$43,096)
	972	Passport certified seriously delinquent tax debt reversal	2/24/2025	\$0
2009				
	460	Extension of time to file tax return	4/15/2010	\$0
	806	W-2 or 1099 withholding	4/15/2010	(\$118)
	806	W-2 or 1099 withholding	4/15/2010	(\$9)
	150	Tax return filed	11/22/2010	\$90,052
	170	Penalty for not pre-paying tax 04-30-2025	11/22/2010	\$2,153
	196	Interest charged for late payment	11/22/2010	\$2,205
	276	Penalty for late payment of tax	11/22/2010	\$3,597
	971	Notice issued CP 0014	11/22/2010	\$0
	971	Pending installment agreement	1/11/2011	\$0
	971	Tax period blocked from automated levy program	2/7/2011	\$0
	971	Installment agreement established	4/11/2011	\$0 \$0
	582	Lien placed on assets due to balance owed	4/11/2011	\$0

Tax Year	Code	Explanation of Transaction	Date	Amount
2009				
	971	Issued notice of lien filing and right to Collection Due Process hearing	4/26/2011	\$0
	971	Pending installment agreement	1/30/2012	\$0
	922	Review of unreported income	2/27/2012	\$0
	240	Miscellaneous penalty 04-08-2026 IRC 6662(c), (d), (e), (f), (g), or (h) Accuracy-Related Penalty	3/12/2012	\$2,521
	290	Additional tax assessed 04-08-2026	3/12/2012	\$12,614
	971	Notice issued CP 0021	3/12/2012	\$0
	960	Appointed representative	10/10/2012	\$0
	971	Pending installment agreement	1/16/2013	\$0
	971	No longer in installment agreement status	9/2/2013	\$0
	196	Interest charged for late payment	7/7/2014	\$14,098
	276	Penalty for late payment of tax	7/7/2014	\$20,488
	971	Notice issued CP 071C	7/7/2014	\$0
	971	Collection due process Notice of Intent to Levy issued	7/22/2015	\$0
	971	Collection due process Notice of Intent to Levy refused or unclaimed	8/19/2015	\$0
	971	Federal Payment Levy Program - Levy Issued	10/26/2015	\$0
	971	Installment agreement established	3/9/2016	\$0
	971	Installment agreement established	3/17/2016	\$0
	971	No longer in installment agreement status	2/11/2019	\$0
	971	First Levy Issued on Module	2/18/2019	\$0
	971	Tax period blocked from automated levy program	2/18/2019	\$0
	971	Federal Payment Levy Program - Levy Issued	2/25/2019	\$0
	971	Passport certified seriously delinquent tax debt	3/4/2019	\$0
	196	Interest charged for late payment	7/6/2020	\$41,903
	276	Penalty for late payment of tax	7/6/2020	\$1,549
	971	Notice issued CP 071C	7/6/2020	\$0
	583	Removed lien	2/5/2021	\$0
	196	Interest charged for late payment	7/11/2022	\$12,518
	971	Notice issued CP 071C	7/11/2022	\$0
	961	Removed appointed representative	8/1/2022	\$0
	960	Appointed representative	3/10/2023	\$0
	971	Federal Payment Levy Program - Levy Issued	2/10/2025	\$0
	706	Credit transferred in from 30 20131231	2/14/2025	(\$1,024)
	706	Credit transferred in from 30 20131231	3/14/2025	(\$1,090)
	971	Tax period blocked from automated levy program	7/21/2025	\$0

## PAYMENT, CREDIT, ABATEMENT HISTORY\*

Tax Year	Code	Explanation of Transaction	Date	Amount
2025				
	660	Estimated tax payment	2/28/2025	-25000
	660	Estimated tax payment	3/31/2025	-25000
	660	Estimated tax payment	4/30/2025	-25000
	660	Estimated tax payment	5/30/2025	-25000
	660	Estimated tax payment	6/30/2025	-25000
2024				
	660	Estimated tax payment	8/5/2024	-25000
	660	Estimated tax payment	8/30/2024	-25000
	660	Estimated tax payment	9/30/2024	-2500
	660	Estimated tax payment	10/31/2024	-2500
	660	Estimated tax payment	12/31/2024	-2500
	660	Estimated tax payment	1/31/2025	-2500
2023				
	660	Estimated tax payment	4/28/2023	-2500
	660	Estimated tax payment	5/31/2023	-2500
	660	Estimated tax payment	6/30/2023	-2500
	660	Estimated tax payment	7/31/2023	-2500
	660	Estimated tax payment	8/31/2023	-2500
		Estimated tax payment	9/29/2023	-2500
	660	Estimated tax payment	10/31/2023	-2500
	660	Estimated tax payment	1/16/2024	-5400
	660	Estimated tax payment	1/16/2024	-3000
	660	Estimated tax payment	4/12/2024	-6000
	670	Payment	10/15/2024	-5508
		Payment	10/15/2024	-1500
		Payment	12/23/2024	-186.5
2022				
	660	Estimated tax payment	4/29/2022	-1500
	660	Estimated tax payment	5/31/2022	-1500
	660	Estimated tax payment	6/30/2022	-1500
	660	Estimated tax payment	7/29/2022	-2500
	660	Estimated tax payment	8/31/2022	-2500
	660	Estimated tax payment	9/30/2022	-2500
	660	Estimated tax payment	10/31/2022	-2500
	660	Estimated tax payment	11/30/2022	-2500
		Estimated tax payment	12/30/2022	-2500
		Estimated tax payment	1/31/2023	-2500
	670	Payment	2/15/2023	-109
		Estimated tax payment	2/28/2023	-2500
		Estimated tax payment	3/31/2023	-2500
		Estimated tax payment	4/18/2023	-4000
		Payment	10/13/2023	-7000
		Payment	10/16/2023	-658

<sup>\*</sup>Does not include Civil Penalty amounts

ax Year	Code	Explanation of Transaction	Date	Amount
2021				
	660	Estimated tax payment	7/30/2021	-10000
	660	Estimated tax payment	8/31/2021	-10000
	660	Estimated tax payment	9/30/2021	-10000
	660	Estimated tax payment	10/29/2021	-10000
	660	Estimated tax payment	11/30/2021	-12000
	660	Estimated tax payment	12/31/2021	-12000
	660	Estimated tax payment	1/31/2022	-1200
	660	Estimated tax payment	2/28/2022	-1200
	660	Estimated tax payment	3/31/2022	-1500
	660	Estimated tax payment	4/7/2022	-13000
	660	Estimated tax payment	8/31/2022	-1000
	670	Payment	10/11/2022	-2213
	670	Payment	12/8/2022	-1395.6
2020				
	660	Estimated tax payment	7/28/2020	-750
		Estimated tax payment	8/28/2020	-750
	660	Estimated tax payment	9/29/2020	-750
		Estimated tax payment	10/30/2020	-750
		Estimated tax payment	11/30/2020	-750
		Estimated tax payment	12/31/2020	-750
		Estimated tax payment	1/29/2021	-750
		Estimated tax payment	2/26/2021	-750
		Estimated tax payment	3/31/2021	-1000
		Estimated tax payment	4/15/2021	-1000
		Estimated tax payment	5/17/2021	-1250
		Estimated tax payment	5/28/2021	-1000
		Estimated tax payment	6/30/2021	-1000
		Payment	10/6/2021	-977
		Payment	1/7/2022	-100.0
2019				
	660	Estimated tax payment	11/7/2019	-250
		Estimated tax payment	12/9/2019	-250
		Estimated tax payment	12/27/2019	-250
		Estimated tax payment	1/6/2020	-500
		Estimated tax payment	1/6/2020	-250
		Estimated tax payment	1/27/2020	-500
		Estimated tax payment	2/3/2020	-500
		Estimated tax payment	2/24/2020	-500
		Estimated tax payment	3/4/2020	-500
		Estimated tax payment	3/6/2020	-500
		Estimated tax payment	3/24/2020	-500
		Estimated tax payment	4/14/2020	-1000
		Payment	10/13/2020	-5579

<sup>\*</sup>Does not include Civil Penalty amounts

ax Year	Code	Explanation of Transaction	Date	Amount
2019				
	670	Payment	10/13/2020	-80
2018				
	660	Estimated tax payment	1/28/2019	-250
	660	Estimated tax payment	1/31/2019	-250
	660	Estimated tax payment	2/26/2019	-250
	670	Payment	4/14/2019	-88
	660	Estimated tax payment	4/15/2019	-750
	660	Estimated tax payment	6/17/2019	-50
	660	Estimated tax payment	7/5/2019	-25
	660	Estimated tax payment	8/28/2019	-250
	660	Estimated tax payment	8/30/2019	-25
	670	Payment	9/17/2019	-250
2017				
	806	W-2 or 1099 withholding	4/15/2018	-(
	660	Estimated tax payment	6/4/2018	-100
	660	Estimated tax payment	6/5/2018	-100
		Estimated tax payment	6/6/2018	-100
		Estimated tax payment	6/7/2018	-100
		Payment	10/12/2018	-107
		Payment	11/19/2018	-490
2016				
	430	Estimated tax payment	4/15/2016	-1829.:
		Estimated tax payment	6/15/2016	-1216
		Estimated tax payment	1/13/2017	-3158.
		W-2 or 1099 withholding	4/15/2017	-6
		Estimated tax payment	6/29/2017	-100
		Estimated tax payment	7/26/2017	-100
		Payment	9/19/2017	-25
		Payment	9/25/2017	-25
		Payment	10/4/2017	-25
		Payment	10/6/2017	-25
		Payment	10/11/2017	-50
		Payment	10/12/2017	-20
		Payment	10/13/2017	-89
		Payment	10/13/2017	-75
		Payment	10/15/2017	-66
		Payment	10/15/2017	-52
			10/16/2017	
2015	670	Payment	10/16/2017	-8032.
2010	420	Estimated toy payment	A/4 E/204 E	1750
		Estimated tax payment	4/15/2015	-1753.
		Estimated tax payment	6/14/2015	-1257.
		Estimated tax payment	9/4/2015	-500
	660	Estimated tax payment	9/14/2015	-20

ax Year	Code	Explanation of Transaction	Date	Amount
2015				
	430	Estimated tax payment	9/16/2015	-1844.3
	660	Estimated tax payment	9/21/2015	-2000
	660	Estimated tax payment	9/25/2015	-360
	660	Estimated tax payment	10/27/2015	-100
	660	Estimated tax payment	10/30/2015	-100
	660	Estimated tax payment	11/4/2015	-100
	660	Estimated tax payment	11/17/2015	-100
	660	Estimated tax payment	12/16/2015	-300
	430	Estimated tax payment	1/15/2016	-2548.3
	660	Estimated tax payment	2/29/2016	-90
	806	W-2 or 1099 withholding	4/15/2016	-45
	670	Payment	4/20/2016	-950
		Payment with return	10/24/2016	-2873
2014				
	430	Estimated tax payment	4/12/2014	-1488.4
		Estimated tax payment	6/14/2014	-1028.6
		Estimated tax payment	9/15/2014	-1750.1
		Estimated tax payment	1/15/2015	-2477.9
		Payment	4/15/2025	-109
		Payment	5/15/2025	-109
		Payment	6/13/2025	-109
		Payment	7/15/2025	-109
2013	0.0	, aymoni	17.10/2020	.00
	430	Estimated tax payment	1/16/2014	-702.8
		Estimated tax payment	2/5/2014	-500
		Payment	4/14/2023	-109
		Payment	5/15/2023	-109
		Payment	6/15/2023	-109
		Payment	7/14/2023	-109
		Payment	8/15/2023	-109
		Payment	9/15/2023	-109
		Payment	10/13/2023	-109
		Payment	11/15/2023	-109
		Payment	12/15/2023	-109
		Payment	1/12/2024	-109
		Payment	2/15/2024	-109
		Payment	3/15/2024	-109
		Payment	4/15/2024	-109
		Payment	5/15/2024	-109
		Payment	6/14/2024	-109
		Payment	7/15/2024	-109
		Payment	8/15/2024	-109
	6/11	Pal/mant	8/16/11/11	

x Year	Code	Explanation of Transaction	Date	Amount
2013				
	670	Payment	10/15/2024	-1090
	670	Payment	11/15/2024	-1090
	670	Payment	12/13/2024	-1090
	670	Payment	1/15/2025	-1090
	670	Payment	2/14/2025	-1090
	534	Write-off of balance due	3/10/2025	-90022.9
	670	Payment	3/14/2025	-109
2012				
	610	Payment with return	7/8/2013	-750
	660	Estimated tax payment	8/16/2013	-750
		Payment	9/15/2021	-109
	670	Payment	10/13/2021	-109
		Payment	11/15/2021	-109
		Payment	12/15/2021	-109
		Payment	1/14/2022	-109
		Payment	2/15/2022	-109
		Payment	3/15/2022	-109
		Payment	4/15/2022	-109
		Payment	5/13/2022	-109
		Payment	6/15/2022	-109
		Payment	7/15/2022	-109
		Payment	8/15/2022	-109
		Payment	9/15/2022	-109
		Payment	10/14/2022	-109
		Payment	11/15/2022	-109
		Payment	12/15/2022	-109
		Payment	1/13/2023	-109
		Payment	3/15/2023	-109
		Credit transferred in from 30 20221231	10/16/2023	-1757.4
		Write-off of balance due -\$30,196.72	1/1/2024	-30196.7
2011	000	Ville on or balance due \$66,100.72	17172024	00100.7
	670	Payment	5/16/2016	-103
		Payment	5/16/2016	-5
		Payment	6/15/2016	-109
		Payment	7/15/2016	-109
		Payment	8/15/2016	-109
		Payment	9/15/2016	-109
		Payment	10/17/2016	-109
		Credit transferred in from 30 20151231	10/24/2016	-83.5
		Payment	11/15/2016	-63.5 -109
		Payment	12/15/2016	-109
		Payment	1/16/2017	-109
		Payment	2/15/2017	-109

Tax Year	Code	Explanation of Transaction	Date	Amount
2011				
	670	Payment	5/15/2017	-109
	670	Payment	6/15/2017	-109
	670	Payment	7/17/2017	-109
	670	Payment	8/15/2017	-109
	670	Payment	9/15/2017	-109
	670	Payment	10/16/2017	-109
	706	Credit transferred in from 30 20161231	10/16/2017	-81.2
	670	Payment	11/15/2017	-109
	670	Payment	12/15/2017	-109
	670	Payment	1/15/2018	-109
	670	Payment	2/15/2018	-109
		Payment	3/15/2018	-109
	670	Payment	4/16/2018	-109
		Payment	5/15/2018	-109
		Payment	6/15/2018	-109
		Payment	7/16/2018	-109
		Payment	8/15/2018	-109
		Payment	9/17/2018	-109
		Payment	10/15/2018	-109
		Payment	11/15/2018	-109
		Credit transferred in from 30 20181231	8/30/2019	-584.7
		Credit transferred in from 30 20181231	9/17/2019	-250
		Payment	10/15/2019	-109
		Payment	11/15/2019	-109
		Payment	12/13/2019	-109
		Payment	1/15/2020	-109
		Payment	2/14/2020	-109
		Payment	3/13/2020	-109
		Payment	4/15/2020	-109
		Payment	5/15/2020	-109
		Payment	6/29/2020	-109
		Payment	7/15/2020	-109
		Payment	8/14/2020	-109
		Payment	9/15/2020	-109
		Credit transferred in from 30 20191231	10/13/2020	-9.1
		Payment Payment	10/15/2020	-109
		Payment	11/13/2020	-109
		Payment	12/15/2020	-109
		Payment	1/15/2021	-109
		Payment	2/12/2021	-109
		Payment	3/15/2021	-109
		Payment	4/15/2021	-109
		Payment Payment	5/14/2021	-109

Tax Year	Code	Explanation of Transaction	Date	Amount
2011				
	670	Payment	6/15/2021	-1090
	670	Payment	7/15/2021	-1090
	670	Payment	8/13/2021	-1090
2010				
	766	Credit to your account	4/15/2011	-167
	608	Write-off of balance due -\$43,096.30	2/17/2025	-43096.3
2009				
	806	W-2 or 1099 withholding	4/15/2010	-118
	806	W-2 or 1099 withholding	4/15/2010	-9
	706	Credit transferred in from 30 20131231	2/14/2025	-1024.44
	706	Credit transferred in from 30 20131231	3/14/2025	-1090

<sup>\*</sup>Does not include Civil Penalty amounts

#### PENALTY AND INTEREST DASHBOARD

				Penalties Failure to	Penalties Failure to	Accuracy Related					
Year	Return Filed	FTA	PA	File	Pay	Penalties	Accrued Penalty	Total Penalties*	Accrued Interest	Assessed Interest	Total Interest
2025	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2024	No						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2023	Original	N			\$1,795.32		\$0.00	\$1,795.32	\$0.00	\$2,443.71	\$2,443.71
2022	Original	N			\$2,039.67		\$0.00	\$2,039.67	\$0.00	\$2,426.60	\$2,426.60
2021	Original	N			\$863.94		\$0.00	\$863.94	\$8.64	\$641.31	\$649.95
2020	Original	N			\$356.10		\$0.00	\$356.10	\$0.00	\$142.90	\$142.90
2019	Original	N			\$820.09		\$0.00	\$820.09	\$0.00	\$404.80	\$404.80
2018	Original	N			\$188.17		\$0.00	\$188.17	\$0.00	\$149.10	\$149.10
2017	Original	N			\$674.20		\$0.00	\$674.20	\$0.00	\$516.36	\$516.36
2016	Original	N			\$1,811.12		\$0.00	\$1,811.12	\$0.00	\$1,159.42	\$1,159.42
2015	Original	N			\$806.70		\$0.00	\$806.70	\$0.00	\$477.30	\$477.30
2014	Original	N			\$12,854.44		\$0.00	\$12,854.44	\$20,863.25	\$18,787.89	\$39,651.14
2013	Original	N			\$17,031.78		\$0.00	\$17,031.78	\$0.00	\$27,940.57	\$27,940.57
2012	Original	N			\$7,592.24		\$0.00	\$7,592.24	\$0.00	\$14,075.90	\$14,075.90
2011	Original	N			\$9,243.24		\$0.00	\$9,243.24	\$0.00	\$10,259.52	\$10,259.52
2010	Original	N			\$5,790.00		\$0.00	\$5,790.00	\$0.00	\$13,644.80	\$13,644.80
2009	Original	N			\$25,634.74	\$2,521.00	\$0.00	\$28,155.74	\$50,742.00	\$70,723.52	\$121,465.52
	Totals			\$0.00	\$87,501.75	\$2,521.00	\$0.00	\$90,022.75	\$71,613.89	\$163,793.70	\$235,407.59

\*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)*
2025	No	none	4/15/2026	open	4/15/2029	not filed	\$125,000.00	\$125,000.00
2024	No	none	4/15/2025	open	4/15/2028	not filed	\$150,000.00	\$150,000.00
2023	Original	10/14/2024	4/15/2024	10/14/2027	4/15/2027	10/14/2027	\$389,266.57	\$289,266.57
2022	Original	10/15/2023	4/15/2023	10/15/2026	4/15/2026	10/15/2026	\$385,915.58	\$74,825.58
2021	Original	10/11/2022	4/15/2022	10/11/2025	4/15/2025	10/11/2025	expired	\$0.00
2020	Original	10/8/2021	5/17/2021	10/8/2024	5/17/2024	10/8/2024	expired	\$0.00
2019	Original	10/12/2020	7/15/2020	10/12/2023	7/15/2023	10/12/2023	expired	\$0.00
2018	Original	10/15/2019	4/15/2019	10/15/2022	4/15/2022	10/15/2022	expired	\$0.00
2017	Original	10/12/2018	4/15/2018	10/12/2021	4/15/2021	10/12/2021	expired	\$0.00
2016	Original	10/16/2017	4/15/2017	10/16/2020	4/15/2020	10/16/2020	expired	\$0.00
2015	Original	10/17/2016	4/15/2016	10/17/2019	4/15/2019	10/17/2019	expired	\$0.00
2014	Original	9/24/2015	4/15/2015	9/24/2018	4/15/2018	9/24/2018	expired	\$4,360.00
2013	Original	10/15/2014	4/15/2014	10/15/2017	4/15/2017	10/15/2017	expired	\$19,685.56
2012	Original	10/15/2013	4/15/2013	10/15/2016	4/15/2016	10/15/2016	expired	\$1,757.42
2011	Original	10/15/2012	4/15/2012	10/15/2015	4/15/2015	10/15/2015	expired	\$0.00
2010	Original	10/17/2011	4/15/2011	10/17/2014	4/15/2014			\$0.00
2009	Original	10/15/2010	4/15/2010	10/15/2013	4/15/2013	10/15/2013	expired	\$2,114.44

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

#### RESOLUTION AND COLLECTION DASHBOARD

			SFR Filed	Final Notice of Intent To Levy	Collections		Last Activity	Estimated CSED	Estimated 72 Mth
Year	Accrued Balance	Return Filed	Date	Date	Active	Last Activity	Date	IA Payments*	IA Payments*
2025	(\$125,000.00)	No	none	none				\$0.00	
2024	(\$150,000.00)	No	none	none				\$0.00	
2023	\$0.00	Original	none	none				\$0.00	\$0.00
2022	\$0.00	Original	none	none				\$0.00	\$0.00
2021	\$8.64	Original	none	none				\$0.13	\$0.15
2020	\$0.00	Original	none	none				\$0.00	\$0.00
2019	\$0.00	Original	none	none				\$0.00	\$0.00
2018	\$0.00	Original	none	none				\$0.00	\$0.00
2017	\$0.00	Original	none	none		No longer in installment agreement status	12/17/2018	\$0.00	\$0.00
2016	\$0.00	Original	none	none				\$0.00	\$0.00
2015	\$0.00	Original	none	none				\$0.00	\$0.00
2014	\$100,358.88	Original	none	none	No	No longer in installment agreement status	2/11/2019	\$22,846.41	\$22,898.32
2013	\$0.00	Original	none	7/22/2015		No longer in installment agreement status	2/11/2019	\$0.00	\$0.00
2012	\$0.00	Original	none	7/22/2015		No longer in installment agreement status	2/11/2019	\$0.00	\$0.00
2011	\$0.00	Original	none	7/22/2015		No longer in installment agreement status	2/11/2019	\$0.00	\$0.00
2010	\$0.00	Original	none	7/22/2015		No longer in installment agreement status	2/11/2019	\$0.00	\$0.00
2009	\$252,198.82	Original	none	7/22/2015	3/13/2019	No longer in installment agreement status	2/11/2019	\$0.00	\$0.00
						Total Estimated IA Payment (Does Not Include SRP)*		\$22,846.54	\$22,898.47

<sup>\*</sup>Includes IRS daily accrued interest of 7% APR.