Resolution Readiness Report

Tax Filing Compliance	YES	Active Audit or Exam	NO	Upcoming Appeal Deadline	NO
In Active Collections	NO	Assigned To Private Collections Agency	NO	Passport Certified For Revocation	NO
Penalty Abatement Opportunity	NO	Tax Lien Filed	NO	Estimated Monthly Payment	$428.20

Year	Return Filed	Filing Status	Lien Active	Final Notice of Intent to Levy	Collections Active	Exam/Audit Active	THS Calculated CSED	Last Activity	Last Activity Date	Total Balance
2026	-	Uk								-
2025	-	Uk								-
2024	Original	HOH		none	No		6/3/2035	Balance due account currently not collectible - not due to hardship	11/26/2025	$3,442.14
2023	Original	HOH		none	No		11/19/2034	Balance due account currently not collectible - not due to hardship	11/26/2025	$5,981.93
2022	Original	MFS		none	No		10/8/2034	Balance due account currently not collectible - not due to hardship	11/26/2025	$6,383.72
2021	Original	MFJ		none	No		5/17/2032	Balance due account currently not collectible - not due to hardship	11/26/2025	$2,608.51
2020	Original	MFJ		none			7/6/2031			$0.00
2019	Original	MFJ		none	No		8/18/2030	Balance due account currently not collectible - not due to hardship	11/26/2025	$4,195.09
2018	Original	MFJ		none	No		11/26/2029	Balance due account currently not collectible - not due to hardship	11/26/2025	$603.88
2017	Original	MFJ		none			5/15/2028			$0.00
2016	Original	MFJ		5/28/2018			6/6/2027	Balance due account currently not collectible - not due to hardship	4/13/2021	$0.00
2015	Original	MFJ		none			4/5/2026			$0.00
2014	Original	MFJ		none			10/20/2025			$0.00
2013	Original	MFJ		7/31/2015			6/3/2024			$0.00
2012	-	Uk								-
2011	-	Uk								-
2010	-	Uk								-
							TOTAL			$23,215.27

*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.		

In Active Collections	NO	A taxpayer is in active collections when the IRS has met all required pre levy notifications and may levy the taxpayer at any time without additional notification being legally required.

Assigned to Private Collections Agency	NO	Congress requires the IRS to hire Private Collection Agencies (PCA) to assist in collecting certain overdue tax accounts. Notice CP40 issued by the IRS will contain details on the assigned PCA and a taxpayer authentication number which will be needed to speak with the PCA.

Passport Certified for Revocation	NO	The Fixing America's Surface Transportation (FAST) Act requires the IRS to certify seriously delinquent taxes to the State Department for potential revocation or denial of the taxpayer's passport. IRS Notice CP508C will be issued upon certifying the debt, the State Department will notify the taxpayer in writing if their passport is revoked, or an application is denied.

Elligible for First Time Abatament	NO	

Tax Lien Filed	NO	Tax Periods	

Streamline Installment Agreement	YES	$428.20	Non Streamline Installment Agreement	YES	$342.80

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? = Lower Is Taxpayer in resolution? = No Current resolution monthly payment? = 433 prepared? = Yes MDI amount? = 0 Taxpayer maximum monthly payment? = 50 Taxpayer target monthly payment? = 50 Unresolved state tax debt? = No Which states? = State debt amount owed? = RO or RA Assigned? = No Taxpayer home value? = 0 Tax pro notes: Spouse not willing to pay his share of liability on the joint returns
Collectability Opinion	LOW – moderate income with a dependent makes full payment unlikely for now though that may change over the remaining life of the Collection Statute Expiration Dates (CSEDs).
Criminal Evaluation	LOW – balance due under $100k, needs to correct withholdings to prevent pyramiding additional liabilities.
Summary & Strategy	Unfortunately, the IRS considers both taxpayers who file a joint return 100% liable for the balance (the legal concept is joint & several liability). They will collect from whoever they can, not just half from one and half from the other. They will also not acknowledge or go by a court order assigning responsibility for a liability in collecting from a taxpayer (although it can be factor in an equitable spousal relief claim). If your client does have a court order assigning responsibility to the other spouse and does end up paying a debt they were not supposed to under their decree they may have a civil cause of action and should consult with their divorce attorney. Recommend watching Divorce and Joint Tax Debt in the Skill Drill video library at taxmentor.com. All that being said it seems like your client may be a Partial Pay Installment Agreement (PPIA) or even a Currently Not Collectible (CNC) candidate if they fix their withholdings. This means that she may not be paying much if anything towards the balances for now, both the MFJ and the HOH/MFS balances. Would make sure that once you have established the IA or CNC you request/confirm that the IRS has started the process to mirror the MFJ balances into separate assessments and then monitor. This will make sure that your client's account stays separate (for purposes of resolution, tolling, etc.) from the ex-spouse and any activity they may undertake. Recommend watching Separate Assessments in the Skill Drill video library at taxmentor.com. Step 1. Run withholding calculator at irs.gov/individuals/tax-withholding-estimator and counsel client on correction needed to form W-4. Document conversation and advise client that current taxes are allowable expenses in a 433F Collection Information Statement, potentially lowering payments to be made to the back debt. Failure to correct withholdings can cause the IRS to send a Withholding Compliance Letter (aka a Lock In Letter) to the taxpayer's employer. Step 2. Update the 433-F to reflect the increase in withholdings as this is an allowable expense on a Collection Information Statement (CIS).

	Step 3. Review the results of the 433-F with the client, discuss outcomes, and get permission to proceed. a. Be sure to discuss the range of outcomes and that client understands and agrees to best & worst case scenario. b. Make sure client understands that a Notice of Federal Tax Lien (NFTL) will be filed. c. Also, make sure the client understands that the IRS will monitor their income and may request an updated 433-F down the road if they believe their ability to pay has increased. Step 4. Once the client is ready to proceed call 1-866-860-4259 and select option 4 to reach ACS and verbally submit the 433-F. I would also request that the representative start the process for mirroring the MFJ balances. This is supposed to happen when one spouse establishes an IA or CNC, but the reality is that the IRS is not consistent in making this happen. Step 5. Monitor for the mirroring and once complete make sure the IA or CNC coding remains on the account (some weird things can happen systemically when mirroring into separate assessments).

DISCLAIMER:

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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
2025	-	Uk	$0.00	$0.00	-	not found	✔
2024	Original	HOH	$4,902.00	$487.14	$3,442.14	12/15/2025	✖
2023	Original	HOH	$5,749.00	$1,479.93	$5,981.93	12/15/2025	✖
2022	Original	MFS	$4,836.00	$2,483.72	$6,383.72	12/15/2025	✖
2021	Original	MFJ	$5,605.00	$593.51	$2,608.51	12/15/2025	✖
2020	Original	MFJ	$1,508.00	$0.00	$0.00	12/15/2025	✔
2019	Original	MFJ	$4,041.00	$1,603.09	$4,195.09	12/15/2025	✖
2018	Original	MFJ	$3,016.00	$628.95	$603.88	12/15/2025	✖
2017	Original	MFJ	$1,817.00	$0.00	$0.00	12/15/2025	✔
2016	Original	MFJ	$1,537.00	$274.93	$0.00	12/15/2025	✔
2015	Original	MFJ	$1,730.00	$0.00	$0.00	12/15/2025	✔
2014	Original	MFJ	$543.00	$0.00	$0.00	12/15/2025	✔
2013	Original	MFJ	$1,195.00	$62.53	$0.00	12/15/2025	✔
2012	-	Uk	$0.00	$0.00	-	not found	✔
2011	-	Uk	$0.00	$0.00	-	not found	✔
2010	-	Uk	$0.00	$0.00	-	not found	✔
		Totals:	$36,479.00	$7,613.80	$23,215.27		

Return Filed Definitions:

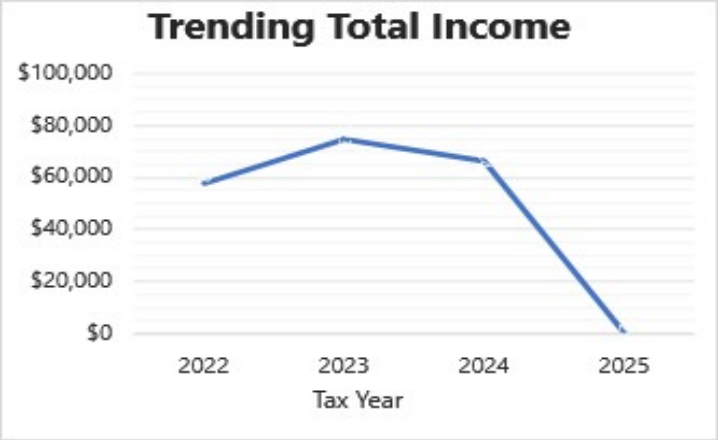
Original = Return filed Amended = Amended return filed	SFR = IRS filed return with no deductions or credits No = no return filed RDNF = IRS has no data

Opportunities:

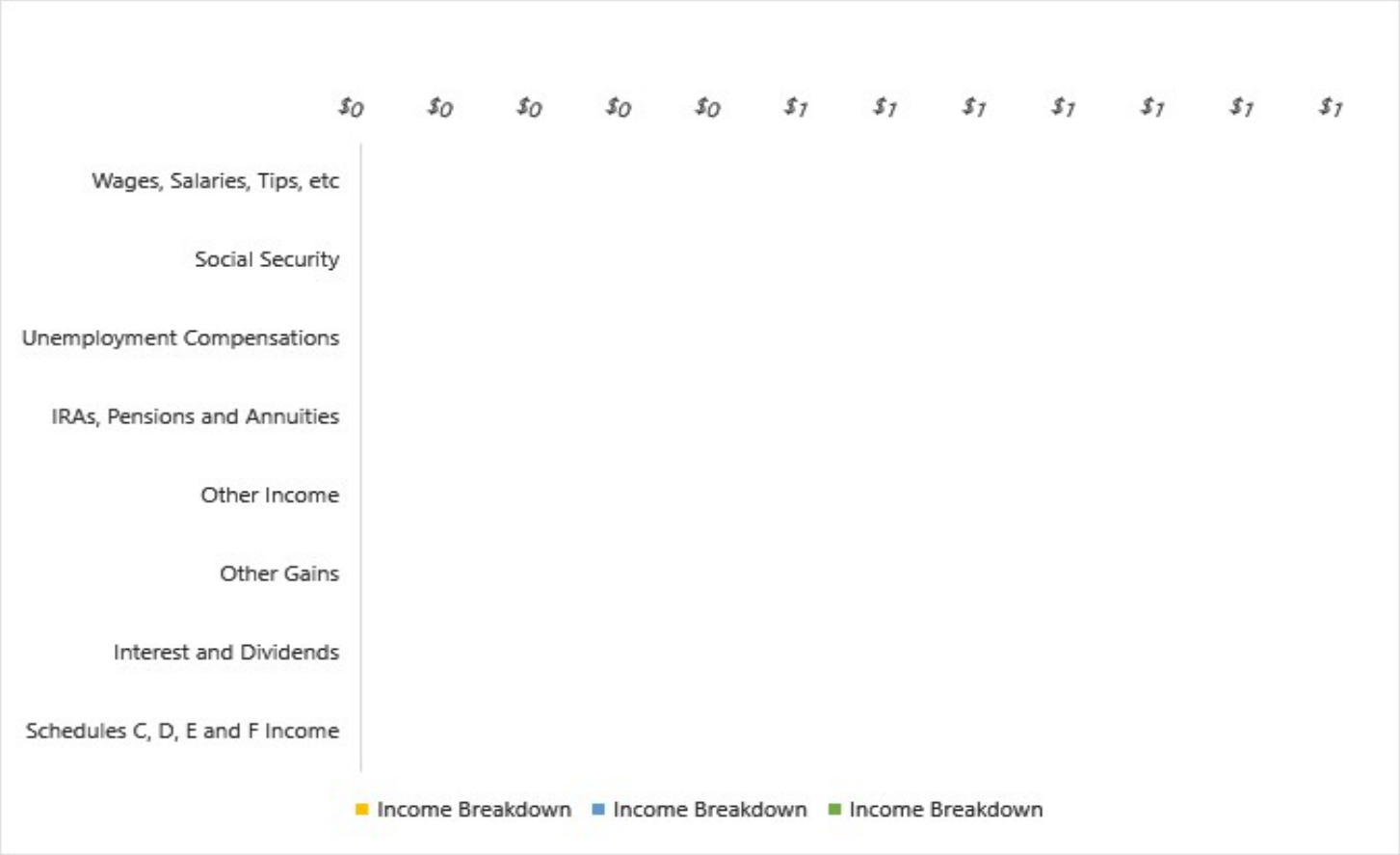
No Opportunities Found.

Issues:

2018 - Taxes owed for this tax year: $604
2019 - Taxes owed for this tax year: $4,195
2021 - Taxes owed for this tax year: $2,609
2022 - Taxes owed for this tax year: $6,384
2023 - Taxes owed for this tax year: $5,982
2024 - Taxes owed for this tax year: $3,442



Income Breakdown



Income Breakdown			
Wage & Income Transcript Date			
Wages, Salaries, Tips, etc			
Social Security			
Unemployment Compensations			
IRAs, Pensions and Annuities			
Other Income			
Other Gains			
Interest and Dividends			
Schedules C, D, E and F Income			

IRS ACCOUNT STATUS DASHBOARD

Year	Return Filed	Filing Status	Extension Date	Lien Active	Collections Active	Examination Active	Assessed Balance	Accrued Balance	Transcript Date
2026	-	Uk					-	-	not found
2025	-	Uk					-	-	not found
2024	Original	HOH			No		$3,135.98	$3,442.14	12/15/2025
2023	Original	HOH	10/15/2024		No		$5,007.50	$5,981.93	12/15/2025
2022	Original	MFS	10/15/2023		No		$5,344.96	$6,383.72	12/15/2025
2021	Original	MFJ			No		$2,281.20	$2,608.51	12/15/2025
2020	Original	MFJ					$0.00	$0.00	12/15/2025
2019	Original	MFJ			No		$2,624.94	$4,195.09	12/15/2025
2018	Original	MFJ	10/15/2019		No		$53.44	$603.88	12/15/2025
2017	Original	MFJ					$0.00	$0.00	12/15/2025
2016	Original	MFJ					$0.00	$0.00	12/15/2025
2015	Original	MFJ					$0.00	$0.00	12/15/2025
2014	Original	MFJ	10/15/2015				$0.00	$0.00	12/15/2025
2013	Original	MFJ					$0.00	$0.00	12/15/2025
2012	-	Uk					-	-	not found
2011	-	Uk					-	-	not found
2010	-	Uk					-	-	not found
						Total	$18,448.02	$23,215.27	

*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	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Totals
Transcript Date:	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	not found	not found	
Medicare Wages:	$40,274	$45,666	$56,620	$61,061	$49,603	$49,995	$63,196	$77,586	-	-	$444,001
Taxable FICA Wages:	$40,274	$45,666	$56,620	$61,061	$49,603	$49,970	$61,423	$71,297	-	-	$435,914
Wages:	$35,425	$40,720	$51,598	$55,695	$44,154	$44,401	$57,411	$73,161	-	-	$402,565
Health Coverage:"	$16,204	$16,496	$17,097	$18,149	$19,185	$20,076	$13,962	$24,763	-	-	$145,932
FICA Tax Withheld:	$2,497	$2,830	$3,510	$3,785	$3,075	$3,099	$3,917	$4,810	-	-	$27,523
Deferred Compensation:	$1,620	$1,620	$1,552	$1,620	$1,620	$1,620	$1,620	$337	-	-	$11,609
Federal Tax Withheld:	$1,061	$1,288	$1,710	$1,441	$1,148	$1,312	$936	$1,246	-	-	$10,142
Taxable FICA Tips:	-	-	-	-	-	$25	$1,773	$6,289	-	-	$8,087
Medicare Withheld:	$583	$661	$820	$884	$718	$724	$916	$1,124	-	-	$6,430
Amount of Debt Discharged:	-	-	-	-	$4,851	-	-	-	-	-	$4,851
Unemployment Compensation:	-	-	-	-	$2,100	-	-	-	-	-	$2,100
Other Income:	-	-	-	-	-	-	$1,050	-	-	-	$1,050
Prior Year Refund:	$0	$13	$115	$0	$0	$15	$104	$0	-	-	$247
Interest:	$0	$0	$0	$0	$0	$0	$0	$13	-	-	$13
Allocated Tips:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Capital Gains:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Dividends:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Gross Distributions:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
IRA Contributions:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Mortgage Interest Paid:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Nonemployee Compensation :	-	-	-	-	$0	$0	$0	$0	-	-	$0
Non-employee Compensation:	$0	$0	$0	$0	-	-	-	-	-	-	$0
Pensions and Annuities:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Points Paid:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Real Estate Sales:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Savings Bonds:	$0	$0	$0	$0	$0	$0	$0	$0	-	-	$0
Taxable Amount:	$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.

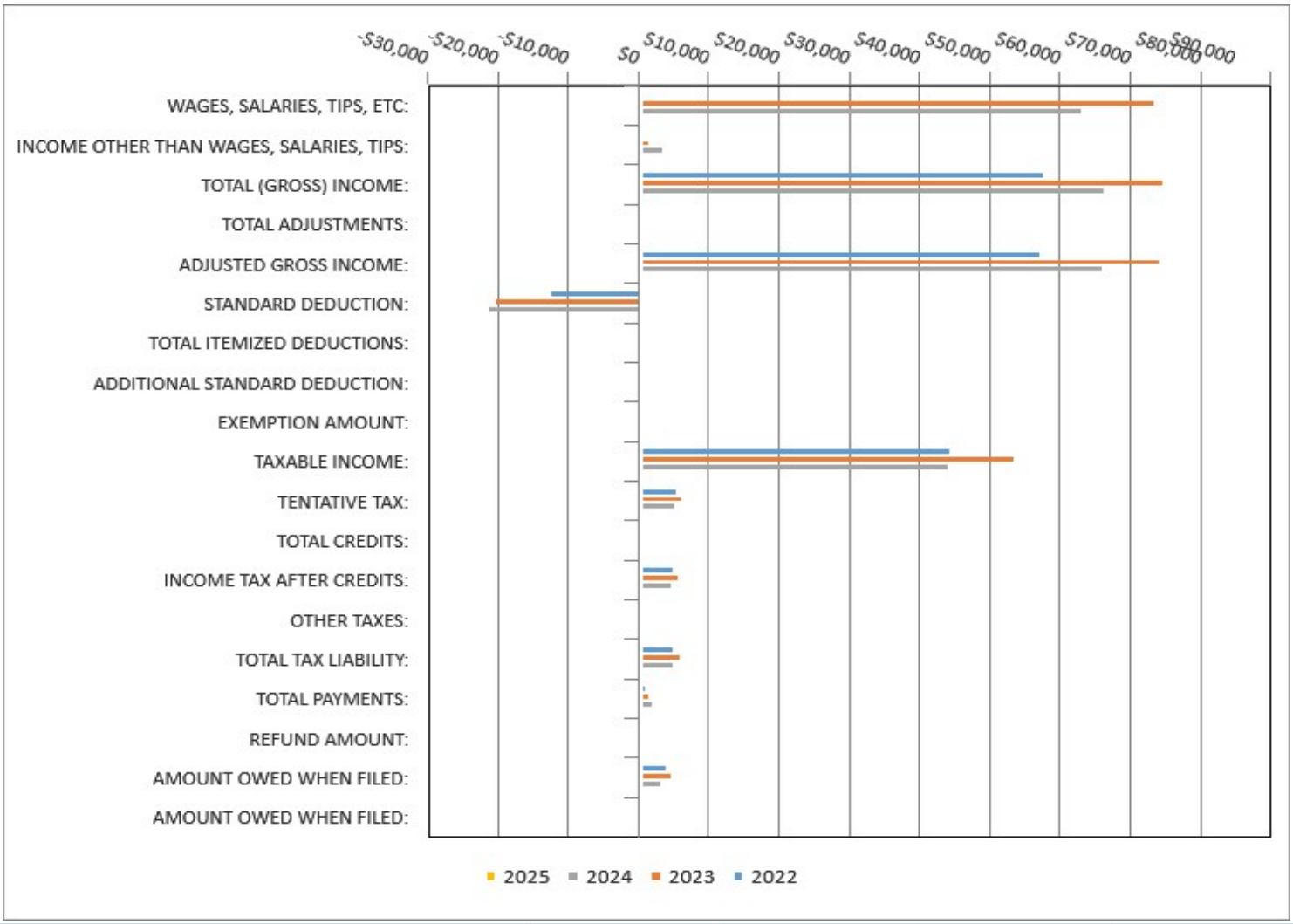
INCOME DOCUMENTS

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Totals
Transcript Date:	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	09/05/2024	not found	not found	
W-2	**1**	**2**	**2**	**2**	**2**	**2**	**2**	**2**	0	0	15
1098	0	0	0	0	0	0	0	0	0	0	0
1098-C	0	0	0	0	0	0	0	0	0	0	0
1098-E	0	0	0	0	0	0	0	0	0	0	0
1098-T	0	0	0	0	0	0	0	0	0	0	0
5498	0	0	0	0	0	0	0	0	0	0	0
5498 SA	0	0	0	0	0	0	0	0	0	0	0
1099-A	0	0	0	0	0	0	0	0	0	0	0
1099-B	0	0	0	0	0	0	0	0	0	0	0
1099-C	0	0	0	0	**1**	0	0	0	0	0	1
1099-CAP	0	0	0	0	0	0	0	0	0	0	0
1099-DIV	0	0	0	0	0	0	0	0	0	0	0
1099-G	0	**1**	**1**	0	**1**	**1**	**1**	0	0	0	5
1099-H	0	0	0	0	0	0	0	0	0	0	0
1099-INT	0	0	0	0	0	0	0	**1**	0	0	1
1099-K	0	0	0	0	0	0	0	0	0	0	0
1099-LTC	0	0	0	0	0	0	0	0	0	0	0
1099-MISC	0	0	0	0	0	0	**1**	0	0	0	1
1099-OID	0	0	0	0	0	0	0	0	0	0	0
1099-PATR	0	0	0	0	0	0	0	0	0	0	0
1099-Q	0	0	0	0	0	0	0	0	0	0	0
1099-R	0	0	0	0	0	0	0	0	0	0	0
1099-S	0	0	0	0	0	0	0	0	0	0	0
1099-SA	0	0	0	0	0	0	0	0	0	0	0
1042-S	0	0	0	0	0	0	0	0	0	0	0
SSA-1099	0	0	0	0	0	0	0	0	0	0	0
SSA-1042S	0	0	0	0	0	0	0	0	0	0	0
RRB-1099	0	0	0	0	0	0	0	0	0	0	0
RRB-1099R	0	0	0	0	0	0	0	0	0	0	0
RRB-1042S	0	0	0	0	0	0	0	0	0	0	0
W-2G	0	0	0	0	0	0	0	0	0	0	0
K-1 1041	0	0	0	0	0	0	0	0	0	0	0
K-1 1065	0	0	0	0	0	0	0	0	0	0	0
K-1 1120s	0	0	0	0	0	0	0	0	0	0	0
W-4	0	0	0	0	0	0	0	0	0	0	0
3921	0	0	0	0	0	0	0	0	0	0	0
3922	0	0	0	0	0	0	0	0	0	0	0
8805	0	0	0	0	0	0	0	0	0	0	0

INCOME DOCUMENTS (cont.)

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	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	**1**	**3**	**3**	**2**	**4**	**3**	**4**	**3**	0	0	23

TAX RETURN OVERVIEW



TAX SUMMARY	2022	2023	2024	2025
RETURN TRANSCRIPT DATE	12/15/2025	12/15/2025	12/15/2025	-
TAX RETURN FILED:	Original	Original	Original	-
TYPE OF RETURN:	1040	1040	1040	-
WAGES, SALARIES, TIPS, ETC:	-	$73,161	$62,797	-
INCOME OTHER THAN WAGES, SALARIES, TIPS:	-	$1,263	$3,270	-
TOTAL (GROSS) INCOME:	$57,413	$74,424	$66,067	-
TOTAL ADJUSTMENTS:	($300)	($388)	($231)	-
ADJUSTED GROSS INCOME:	$57,113	$74,036	$65,836	-
STANDARD DEDUCTION:	($12,950)	($20,800)	($21,900)	-
TOTAL ITEMIZED DEDUCTIONS:	-	-	-	-
ADDITIONAL STANDARD DEDUCTION:	$0	$0	$0	-
EXEMPTION AMOUNT:	$0	$0	$0	-
TAXABLE INCOME:	$44,163	$53,236	$43,936	-
TENTATIVE TAX:	$5,336	$6,073	$4,940	-
TOTAL CREDITS:	($500)	($500)	($500)	-
INCOME TAX AFTER CREDITS:	$4,836	$5,573	$4,440	-
OTHER TAXES:	$0	$176	$462	-
TOTAL TAX LIABILITY:	$4,836	$5,749	$4,902	-
TOTAL PAYMENTS:	$936	$1,247	$1,947	-
REFUND AMOUNT:	-	-	-	-
AMOUNT OWED WHEN FILED:	$3,900	$4,502	$2,955	-
AMOUNT OWED WHEN FILED:				

Year	Code	Assessment	Date	Original Assessed Amount	Remaining Balance	Estimated Total Tolling Days	Estimated THS Calculated CSED	IRS CSED	CSED Days Variation	Months Until CSED	Estimated IA Payments CSED (Including Daily Accrued Interest)**	Estimated IA Payments 72 Mths (Including Daily Accrued Interest)**
2024												
	150	Tax return filed	6/2/2025	$4,902.00	$2,955.00		6/3/2035	6/2/2035	0	114	$35.59	$51.85
	276	Penalty for late payment of tax	6/2/2025	$29.55	$29.55		6/3/2035	6/2/2035	0	114	$0.36	$0.52
	176	Penalty for not pre-paying tax	6/2/2025	$124.10	$124.10		6/3/2035	6/2/2035	0	114	$1.49	$2.18
	196	Interest charged for late payment	6/2/2025	$27.33	$27.33		6/3/2035	6/2/2035	0	114	$0.33	$0.48
		2024 Reversed Credits/Other			$0.00		6/3/2035			-	$0.00	
		2024 Accrued Penalty			$177.30		6/3/2035			114	$2.14	$3.11
		2024 Accrued Interest			$128.86		6/3/2035			114	$1.55	$2.26
		2024 Total IA Payments									$41.46	
2023												
	150	Tax return filed	11/18/2024	$5,749.00	$4,502.00		11/19/2034	11/18/2034	0	107	$56.73	$78.99
	276	Penalty for late payment of tax	11/18/2024	$180.08	$180.08		11/19/2034	11/18/2034	0	107	$2.27	$3.16
	176	Penalty for not pre-paying tax	11/18/2024	$106.77	$106.77		11/19/2034	11/18/2034	0	107	$1.35	$1.87
	196	Interest charged for late payment	11/18/2024	$218.65	$218.65		11/19/2034	11/18/2034	0	107	$2.76	$3.84
		2023 Reversed Credits/Other			$0.00		11/19/2034			-	$0.00	
		2023 Accrued Penalty			$562.75		11/19/2034			107	$7.09	$9.87
		2023 Accrued Interest			$411.68		11/19/2034			107	$5.19	$7.22
		2023 Total IA Payments									$75.39	
2022												
	150	Tax return filed	10/7/2024	$4,836.00	$3,900.00		10/8/2034	10/7/2034	0	106	$49.48	$68.43
	276	Penalty for late payment of tax	10/7/2024	$214.50	$214.50		10/8/2034	10/7/2034	0	106	$2.72	$3.76
	166	Penalty for filing tax return after the	10/7/2024	$877.50	$877.50		10/8/2034	10/7/2034	0	106	$11.13	$15.40
	196	Interest charged for late payment	10/7/2024	$352.96	$352.96		10/8/2034	10/7/2034	0	106	$4.48	$6.19
		2022 Reversed Credits/Other			$0.00		10/8/2034			-	$0.00	
		2022 Accrued Penalty			$546.00		10/8/2034			106	$6.93	$9.58
		2022 Accrued Interest			$492.76		10/8/2034			106	$6.25	$8.65
		2022 Total IA Payments									$80.99	
2021												
	150	Tax return filed	5/16/2022	$5,605.00	$2,015.00		5/17/2032	uk		77	$32.58	$35.35
	196	Interest charged for late payment	5/16/2022	$6.86	$6.86		5/17/2032	uk		77	$0.11	$0.12
	196	Interest charged for late payment	3/11/2024	$259.34	$259.34		5/17/2032	uk		77	$4.19	$4.55
		2021 Reversed Credits/Other			$0.00		5/17/2032			-	$0.00	
		2021 Accrued Penalty			$0.00		5/17/2032			-	$0.00	
		2021 Accrued Interest			$327.31		5/17/2032			77	$5.29	$5.74
		2021 Total IA Payments									$42.17	
2020												
	150	Tax return filed	7/5/2021	$1,508.00	$0.00		7/6/2031	uk		-	$0.00	
	196	Interest charged for late payment	7/5/2021	$0.00	$0.00		7/6/2031	uk		-	$0.00	
		2020 Reversed Credits/Other			$0.00		7/6/2031			-	$0.00	
		2020 Accrued Penalty			$0.00		7/6/2031			-	$0.00	
		2020 Accrued Interest			$0.00		7/6/2031			-	$0.00	
		2020 Total IA Payments									$0.00	
2019												
	150	Tax return filed	8/17/2020	$4,041.00	$2,592.00		8/18/2030	uk		56	$54.41	$55.65
	276	Penalty for late payment of tax	8/17/2020	$25.92	$25.92		8/18/2030	uk		56	$0.54	$0.56

Year	Code	Assessment	Date	Original Assessed Amount	Remaining Balance	Estimated Total Tolling Days	Estimated THS Calculated CSED	IRS CSED	CSED Days Variation	Months Until CSED	Estimated IA Payments CSED (Including Daily Accrued Interest)**	Estimated IA Payments 72 Mths (Including Daily Accrued Interest)**
2019												
	196	Interest charged for late payment	8/17/2020	$7.02	$7.02		8/18/2030	uk		56	$0.15	$0.15
		2019 Reversed Credits/Other			$0.00		8/18/2030			-	$0.00	
		2019 Accrued Penalty			$622.08		8/18/2030			56	$13.06	$13.36
		2019 Accrued Interest			$948.07		8/18/2030			56	$19.90	$20.35
		2019 Total IA Payments									$88.06	
2018												
	150	Tax return filed	11/25/2019	$3,016.00	$0.00		11/26/2029	uk		-	$0.00	
	276	Penalty for late payment of tax	11/25/2019	$42.84	$17.77		11/26/2029	uk		47	$0.43	$0.44
	196	Interest charged for late payment	11/25/2019	$35.67	$35.67		11/26/2029	uk		47	$0.87	$0.89
		2018 Reversed Credits/Other			$0.00		11/26/2029			-	$0.00	
		2018 Accrued Penalty			$224.91		11/26/2029			47	$5.49	$5.59
		2018 Accrued Interest			$325.53		11/26/2029			47	$7.94	$8.09
		2018 Total IA Payments									$14.73	
2017												
	150	Tax return filed	5/14/2018	$1,817.00	$0.00		5/15/2028	uk		-	$0.00	
		2017 Reversed Credits/Other			$0.00		5/15/2028			-	$0.00	
		2017 Accrued Penalty			$0.00		5/15/2028			-	$0.00	
		2017 Accrued Interest			$0.00		5/15/2028			-	$0.00	
		2017 Total IA Payments									$0.00	
2016												
	150	Tax return filed	6/5/2017	$1,537.00	$0.00		6/6/2027	uk		-	$0.00	
	276	Penalty for late payment of tax	6/5/2017	$4.74	$0.00		6/6/2027	uk		-	$0.00	
	196	Interest charged for late payment	6/5/2017	$2.66	$0.00		6/6/2027	uk		-	$0.00	
	276	Penalty for late payment of tax	9/24/2018	$60.61	$0.00		6/6/2027	uk		-	$0.00	
	196	Interest charged for late payment	9/24/2018	$25.94	$0.00		6/6/2027	uk		-	$0.00	
	276	Penalty for late payment of tax	9/23/2019	$35.90	$0.00		6/6/2027	uk		-	$0.00	
	196	Interest charged for late payment	9/23/2019	$25.52	$0.00		6/6/2027	uk		-	$0.00	
	196	Interest charged for late payment	3/11/2024	$119.56	$0.00		6/6/2027	uk		-	$0.00	
		2016 Reversed Credits/Other			$0.00		6/6/2027			-	$0.00	
		2016 Accrued Penalty			$0.00		6/6/2027			-	$0.00	
		2016 Accrued Interest			$0.00		6/6/2027			-	$0.00	
		2016 Total IA Payments									$0.00	
2015												
	150	Tax return filed	4/4/2016	$1,730.00	$0.00		4/5/2026	uk		-	$0.00	
		2015 Reversed Credits/Other			$0.00		4/5/2026			-	$0.00	
		2015 Accrued Penalty			$0.00		4/5/2026			-	$0.00	
		2015 Accrued Interest			$0.00		4/5/2026			-	$0.00	
		2015 Total IA Payments									$0.00	
2014												
	150	Tax return filed	10/19/2015	$543.00	$0.00		10/20/2025	uk		-	$0.00	
		2014 Reversed Credits/Other			$0.00		10/20/2025			-	$0.00	
		2014 Accrued Penalty			$0.00		10/20/2025			-	$0.00	
		2014 Accrued Interest			$0.00		10/20/2025			-	$0.00	
		2014 Total IA Payments									$0.00	

Year	Code	Assessment	Date	Original Assessed Amount	Remaining Balance	Estimated Total Tolling Days	Estimated THS Calculated CSED	IRS CSED	CSED Days Variation	Months Until CSED	Estimated IA Payments CSED (Including Daily Accrued Interest)**	Estimated IA Payments 72 Mths (Including Daily Accrued Interest)**
2013												
	150	Tax return filed	6/2/2014	$1,195.00	$0.00		6/3/2024	uk		-	$0.00	
	276	Penalty for late payment of tax	6/2/2014	$5.18	$0.00		6/3/2024	uk		-	$0.00	
	196	Interest charged for late payment	6/2/2014	$2.05	$0.00		6/3/2024	uk		-	$0.00	
	276	Penalty for late payment of tax	10/19/2015	$41.44	$0.00		6/3/2024	uk		-	$0.00	
	196	Interest charged for late payment	10/19/2015	$13.86	$0.00		6/3/2024	uk		-	$0.00	
		2013 Reversed Credits/Other			$0.00		6/3/2024			-	$0.00	
		2013 Accrued Penalty			$0.00		6/3/2024			-	$0.00	
		2013 Accrued Interest			$0.00		6/3/2024			-	$0.00	
		2013 Total IA Payments									$0.00	

CSED TOLLING CALCULATIONS

Year	Code	Explanation of Transaction	Start Date	End Date	End Code	Tolling Days	Additional Tolling Days	Total Days
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								
		No Tolling Events Found						
2016								
		No Tolling Events Found						
2015								
		No Tolling Events Found						
2014								
		No Tolling Events Found						
2013								
		No Tolling Events Found						

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

IRS NOTICES

Tax Year	Notice Number	Notice Issued	Date
2024			
	CP 0014	Notice issued	6/2/2025
2023			
	CP 0014	Notice issued	11/18/2024
2022			
	CP 0014	Notice issued	10/7/2024
2021			
		Notice issued NOTICE1444	4/1/2021
		Notice issued L6416	5/24/2021
		Notice issued LETTER6417	7/1/2021
	CP 0011	Notice issued	5/16/2022
		Collection referred to a private debt collection agency	6/20/2022
	CP 0040	Notice issued	6/20/2022
		Collection referral to a private debt collection agency is returned	12/20/2023
		Collection referral to private debt collection agency is reversed	1/22/2024
	CP 071C	Notice issued	3/11/2024
2020			
		Notice issued NOTICE1444	5/18/2020
	CP 0014	Notice issued	7/5/2021
	CP 0021	Notice issued	8/9/2021
	CP 0049	Notice issued	8/9/2021
2019			
	CP 0014	Notice issued	8/17/2020
		Collection referred to a private debt collection agency	12/27/2021
	CP 0040	Notice issued	12/27/2021
		Collection referral to a private debt collection agency is returned	12/20/2023
		Collection referral to private debt collection agency is reversed	1/22/2024
2018			
	CP 0014	Notice issued	11/25/2019
		Collection referred to a private debt collection agency	12/27/2021
	CP 0040	Notice issued	12/27/2021
		Collection referral to a private debt collection agency is returned	12/20/2023
		Collection referral to private debt collection agency is reversed	1/22/2024
	CP 0039	Notice issued	3/11/2024
2016			
	CP 0014	Notice issued	6/5/2017
		Collection due process Notice of Intent to Levy -- issued	5/28/2018
	CP 0092	Notice issued	5/28/2018
	CP 0071	Notice issued	9/24/2018
	CP 0071	Notice issued	9/23/2019
		Collection referred to a private debt collection agency	12/27/2021
	CP 0040	Notice issued	12/27/2021
		Collection referral to a private debt collection agency is returned	12/20/2023
		Collection referral to private debt collection agency is reversed	1/22/2024

Tax Year	Notice Number	Notice Issued	Date
2016			
	CP 0039	Notice issued	3/11/2024
2014			
	CP 0049	Notice issued	10/19/2015
2013			
	CP 0014	Notice issued	6/2/2014
		Collection due process Notice of Intent to Levy -- issued	7/31/2015

IRS NOTICE DEFINITIONS

Notice Number	IRS Notice Definitions
CP11	We made changes to your return because we believe there's a miscalculation. You owe money on your taxes as a result of these changes.
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).
CP39	We used a refund from your spouse or former spouse to pay your past due tax debt. You may still owe money.
CP40	If you received an IRS CP40 Notice, the IRS has assigned your tax account to a private collection agency.
CP49	If you received an IRS CP49 Notice, the IRS used all or part of your refund to pay a tax debt.
CP71	You received this notice to remind you of the amount you owe in tax, penalty and interest.
CP92	We levied your state tax refund for unpaid taxes. You have the right to a Collection Due Process hearing.

IRS ACCOUNT SUMMARY

Tax Year	Code	Explanation of Transaction	Date	Amount
2026				
		No Account Transcript Found		
2025				
		No Account Transcript Found		
2024				
	960	Appointed representative	6/10/2024	$0
	960	Appointed representative	12/6/2024	$0
	806	W-2 or 1099 withholding	4/15/2025	($1,947)
	150	Tax return filed	6/2/2025	$4,902
	176	Penalty for not pre-paying tax 06-02-2035	6/2/2025	$124
	196	Interest charged for late payment	6/2/2025	$27
	276	Penalty for late payment of tax	6/2/2025	$30
	971	Notice issued CP 0014	6/2/2025	$0
	971	Tax period blocked from automated levy program	9/29/2025	$0
	530	Balance due account currently not collectible - not due to hardship	11/26/2025	$0
2023				
	960	Appointed representative	10/6/2023	$0
	460	Extension of time to file tax return	4/15/2024	$0
	806	W-2 or 1099 withholding	4/15/2024	($1,247)
	150	Tax return filed	11/18/2024	$5,749
	176	Penalty for not pre-paying tax 11-18-2034	11/18/2024	$107
	196	Interest charged for late payment	11/18/2024	$219
	276	Penalty for late payment of tax	11/18/2024	$180
	971	Notice issued CP 0014	11/18/2024	$0
	960	Appointed representative	12/6/2024	$0
	971	Tax period blocked from automated levy program	2/10/2025	$0
	530	Balance due account currently not collectible - not due to hardship	11/26/2025	$0
2022				
	460	Extension of time to file tax return	4/15/2023	$0
	806	W-2 or 1099 withholding	4/15/2023	($936)
	960	Appointed representative	10/6/2023	$0
	150	Tax return filed	10/7/2024	$4,836
	166	Penalty for filing tax return after the due date 10-07-2034	10/7/2024	$878
	196	Interest charged for late payment	10/7/2024	$353
	276	Penalty for late payment of tax	10/7/2024	$215
	971	Notice issued CP 0014	10/7/2024	$0
	960	Appointed representative	12/6/2024	$0
	971	Tax period blocked from automated levy program	1/6/2025	$0
	530	Balance due account currently not collectible - not due to hardship	11/26/2025	$0
2021				
	290	Additional tax assessed-00-0000	3/29/2021	$0
	766	Credit to your account	3/29/2021	($2,800)
	766	Credit to your account	3/29/2021	($1,400)
	846	Refund issued	3/29/2021	$4,200
	971	Notice issued NOTICE1444	4/1/2021	$0
	971	Notice issued L6416	5/24/2021	$0
	290	Additional tax assessed-00-0000	6/14/2021	$0
	971	Notice issued LETTER6417	7/1/2021	$0
	290	Additional tax assessed-00-0000	7/19/2021	$0
	766	Credit to your account	7/19/2021	($250)

Tax Year	Code	Explanation of Transaction	Date	Amount
2021				
	846	Refund issued	7/19/2021	$250
	290	Additional tax assessed-00-0000	8/23/2021	$0
	766	Credit to your account	8/23/2021	($250)
	846	Refund issued	8/23/2021	$250
	290	Additional tax assessed-00-0000	10/11/2021	$0
	766	Credit to your account	10/11/2021	($157)
	846	Refund issued	10/11/2021	$157
	290	Additional tax assessed-00-0000	10/25/2021	$0
	766	Credit to your account	10/25/2021	($114)
	846	Refund issued	10/25/2021	$114
	290	Additional tax assessed-00-0000	11/22/2021	$0
	766	Credit to your account	11/22/2021	($115)
	846	Refund issued	11/22/2021	$115
	290	Additional tax assessed-00-0000	12/20/2021	$0
	766	Credit to your account	12/20/2021	($114)
	846	Refund issued	12/20/2021	$114
	766	Credit to your account	4/15/2022	($1,500)
	806	W-2 or 1099 withholding	4/15/2022	($2,090)
	150	Tax return filed	5/16/2022	$5,605
	196	Interest charged for late payment	5/16/2022	$7
	971	Notice issued CP 0011	5/16/2022	$0
	530	Balance due account currently not collectible - not due to hardship	6/4/2022	$0
	971	Collection referred to a private debt collection agency	6/20/2022	$0
	971	Notice issued CP 0040	6/20/2022	$0
	960	Appointed representative	10/6/2023	$0
	971	Collection referral to a private debt collection agency is returned	12/20/2023	$0
	972	Collection referral to private debt collection agency is reversed	1/22/2024	$0
	196	Interest charged for late payment	3/11/2024	$259
	971	Notice issued CP 071C	3/11/2024	$0
	537	Account currently considered collectible	9/16/2024	$0
	971	Tax period blocked from automated levy program	11/4/2024	$0
	960	Appointed representative	12/6/2024	$0
	530	Balance due account currently not collectible - not due to hardship	11/26/2025	$0
2020				
	290	Additional tax assessed-00-0000	5/18/2020	$0
	766	Credit to your account	5/18/2020	($2,400)
	766	Credit to your account	5/18/2020	($500)
	846	Refund issued	5/18/2020	$2,900
	971	Notice issued NOTICE1444	5/18/2020	$0
	290	Additional tax assessed-00-0000	1/18/2021	$0
	766	Credit to your account	1/18/2021	($1,200)
	766	Credit to your account	1/18/2021	($600)
	846	Refund issued	1/18/2021	$1,800
	806	W-2 or 1099 withholding	4/15/2021	($1,537)
	826	Credit transferred out to 30 20161231	4/15/2021	$29
	150	Tax return filed	7/5/2021	$2,480
	196	Interest charged for late payment	7/5/2021	$4
	971	Notice issued CP 0014	7/5/2021	$0
	197	Reduced or removed interest charged for late payment	8/9/2021	($4)
	291	Reduced or removed prior tax assessed	8/9/2021	($972)

Tax Year	Code	Explanation of Transaction	Date	Amount
2020				
	971	Notice issued CP 0021	8/9/2021	$0
	971	Notice issued CP 0049	8/9/2021	$0
	960	Appointed representative	10/6/2023	$0
	960	Appointed representative	12/6/2024	$0
2019				
	806	W-2 or 1099 withholding	4/15/2020	($1,449)
	150	Tax return filed	8/17/2020	$4,041
	196	Interest charged for late payment	8/17/2020	$7
	276	Penalty for late payment of tax	8/17/2020	$26
	971	Notice issued CP 0014	8/17/2020	$0
	971	Tax period blocked from automated levy program	2/22/2021	$0
	530	Balance due account currently not collectible - not due to hardship	4/13/2021	$0
	971	Collection referred to a private debt collection agency	12/27/2021	$0
	971	Notice issued CP 0040	12/27/2021	$0
	960	Appointed representative	10/6/2023	$0
	971	Collection referral to a private debt collection agency is returned	12/20/2023	$0
	972	Collection referral to private debt collection agency is reversed	1/22/2024	$0
	537	Account currently considered collectible	9/23/2024	$0
	960	Appointed representative	12/6/2024	$0
	971	Tax period blocked from automated levy program	12/9/2024	$0
	530	Balance due account currently not collectible - not due to hardship	11/26/2025	$0
2018				
	460	Extension of time to file tax return	4/12/2019	$0
	806	W-2 or 1099 withholding	4/15/2019	($1,945)
	150	Tax return filed	11/25/2019	$3,016
	196	Interest charged for late payment	11/25/2019	$36
	276	Penalty for late payment of tax	11/25/2019	$43
	971	Notice issued CP 0014	11/25/2019	$0
	971	Tax period blocked from automated levy program	3/16/2020	$0
	530	Balance due account currently not collectible - not due to hardship	4/13/2021	$0
	971	Collection referred to a private debt collection agency	12/27/2021	$0
	971	Notice issued CP 0040	12/27/2021	$0
	960	Appointed representative	10/6/2023	$0
	971	Collection referral to a private debt collection agency is returned	12/20/2023	$0
	972	Collection referral to private debt collection agency is reversed	1/22/2024	$0
	706	Credit transferred in from 30 20231231	3/11/2024	($996)
	971	Notice issued CP 0039	3/11/2024	$0
	537	Account currently considered collectible	9/23/2024	$0
	960	Appointed representative	12/6/2024	$0
	971	Tax period blocked from automated levy program	12/9/2024	$0
	530	Balance due account currently not collectible - not due to hardship	11/26/2025	$0
	670	Payment	12/9/2025	($100)
2017				
	806	W-2 or 1099 withholding	4/15/2018	($1,721)
	610	Payment with return	4/17/2018	($96)
	150	Tax return filed	5/14/2018	$1,817
2016				
	806	W-2 or 1099 withholding	4/15/2017	($1,063)
	150	Tax return filed	6/5/2017	$1,537
	196	Interest charged for late payment	6/5/2017	$3

Tax Year	Code	Explanation of Transaction	Date	Amount
2016				
	276	Penalty for late payment of tax	6/5/2017	$5
	971	Notice issued CP 0014	6/5/2017	$0
	670	Payment 20	5/3/2018	($115)
	971	Collection due process Notice of Intent to Levy -- issued	5/28/2018	$0
	971	Notice issued CP 0092	5/28/2018	$0
	971	Collection due process Notice of Intent to Levy -- return receipt signed	5/30/2018	$0
	971	Federal Payment Levy Program - Levy Issued	8/6/2018	$0
	971	First Levy Issued on Module	8/6/2018	$0
	196	Interest charged for late payment	9/24/2018	$26
	276	Penalty for late payment of tax	9/24/2018	$61
	971	Notice issued CP 0071	9/24/2018	$0
	196	Interest charged for late payment	9/23/2019	$26
	276	Penalty for late payment of tax	9/23/2019	$36
	971	Notice issued CP 0071	9/23/2019	$0
	971	Tax period blocked from automated levy program	3/16/2020	$0
	971	Federal Payment Levy Program - Levy Issued	3/30/2020	$0
	530	Balance due account currently not collectible - not due to hardship	4/13/2021	$0
	706	Credit transferred in from 30 20201231	4/15/2021	($29)
	971	Collection referred to a private debt collection agency	12/27/2021	$0
	971	Notice issued CP 0040	12/27/2021	$0
	960	Appointed representative	10/6/2023	$0
	971	Collection referral to a private debt collection agency is returned	12/20/2023	$0
	972	Collection referral to private debt collection agency is reversed	1/22/2024	$0
	196	Interest charged for late payment	3/11/2024	$120
	706	Credit transferred in from 30 20231231	3/11/2024	($605)
	971	Notice issued CP 0039	3/11/2024	$0
	960	Appointed representative	12/6/2024	$0
2015				
	150	Tax return filed	4/4/2016	$1,730
	846	Refund issued	4/4/2016	$1,636
	766	Credit to your account	4/15/2016	($1,194)
	768	Earned income credit	4/15/2016	($1,621)
	806	W-2 or 1099 withholding	4/15/2016	($551)
2014				
	460	Extension of time to file tax return	4/15/2015	$0
	766	Credit to your account	4/15/2015	($1,089)
	768	Earned income credit	4/15/2015	($2,012)
	806	W-2 or 1099 withholding	4/15/2015	($557)
	826	Credit transferred out to 30 20131231	4/15/2015	$581
	150	Tax return filed	10/19/2015	$543
	846	Refund issued	10/19/2015	$2,249
	896	Overpayment Credit Offset	10/19/2015	$285
	971	Notice issued CP 0049	10/19/2015	$0
2013				
	806	W-2 or 1099 withholding	4/15/2014	($677)
	150	Tax return filed	6/2/2014	$1,195
	196	Interest charged for late payment	6/2/2014	$2
	276	Penalty for late payment of tax	6/2/2014	$5
	971	Notice issued CP 0014	6/2/2014	$0
	971	Tax period blocked from automated levy program	11/3/2014	$0

Tax Year	Code	Explanation of Transaction	Date	Amount
2013				
	706	Credit transferred in from 30 20141231	4/15/2015	($581)
	971	Collection due process Notice of Intent to Levy -- issued	7/31/2015	$0
	971	Collection due process Notice of Intent to Levy -- return receipt signed	8/10/2015	$0
	196	Interest charged for late payment	10/19/2015	$14
	276	Penalty for late payment of tax	10/19/2015	$41
2012				
		No Account Transcript Found		
2011				
		No Account Transcript Found		
2010				
		No Account Transcript Found		

PAYMENT, CREDIT, ABATEMENT HISTORY*

Tax Year	Code	Explanation of Transaction	Date	Amount
2024				
	806	W-2 or 1099 withholding	4/15/2025	-1947
2023				
	806	W-2 or 1099 withholding	4/15/2024	-1247
2022				
	806	W-2 or 1099 withholding	4/15/2023	-936
2021				
	766	Credit to your account	3/29/2021	-2800
	766	Credit to your account	3/29/2021	-1400
	766	Credit to your account	7/19/2021	-250
	766	Credit to your account	8/23/2021	-250
	766	Credit to your account	10/11/2021	-157
	766	Credit to your account	10/25/2021	-114
	766	Credit to your account	11/22/2021	-115
	766	Credit to your account	12/20/2021	-114
	766	Credit to your account	4/15/2022	-1500
	806	W-2 or 1099 withholding	4/15/2022	-2090
2020				
	766	Credit to your account	5/18/2020	-2400
	766	Credit to your account	5/18/2020	-500
	766	Credit to your account	1/18/2021	-1200
	766	Credit to your account	1/18/2021	-600
	806	W-2 or 1099 withholding	4/15/2021	-1537
	197	Reduced or removed interest charged for late payment	8/9/2021	-3.81
	291	Reduced or removed prior tax assessed	8/9/2021	-972
2019				
	806	W-2 or 1099 withholding	4/15/2020	-1449
2018				
	806	W-2 or 1099 withholding	4/15/2019	-1945
	706	Credit transferred in from 30 20231231	3/11/2024	-996.07
	670	Payment	12/9/2025	-100
2017				
	806	W-2 or 1099 withholding	4/15/2018	-1721
	610	Payment with return	4/17/2018	-96
2016				
	806	W-2 or 1099 withholding	4/15/2017	-1063
	670	Payment 20	5/3/2018	-115
	706	Credit transferred in from 30 20201231	4/15/2021	-29
	706	Credit transferred in from 30 20231231	3/11/2024	-604.93
2015				
	766	Credit to your account	4/15/2016	-1194
	768	Earned income credit	4/15/2016	-1621
	806	W-2 or 1099 withholding	4/15/2016	-551
2014				
	766	Credit to your account	4/15/2015	-1089

*Does not include Civil Penalty amounts

PAYMENT, CREDIT, ABATEMENT HISTORY* (cont.)

Tax Year	Code	Explanation of Transaction	Date	Amount
2014				
	768	Earned income credit	4/15/2015	-2012
	806	W-2 or 1099 withholding	4/15/2015	-557
2013				
	806	W-2 or 1099 withholding	4/15/2014	-677
	706	Credit transferred in from 30 20141231	4/15/2015	-580.53

*Does not include Civil Penalty amounts

PENALTY AND INTEREST DASHBOARD

Year	Return Filed	FTA	PA	Penalties Failure to File	Penalties Failure to Pay	Accuracy Related Penalties	Accrued Penalty	Total Penalties*	Accrued Interest	Assessed Interest	Total Interest
2026	-						-	-	-	$0.00	-
2025	-						-	-	-	$0.00	-
2024	Original	N			$29.55		$177.30	$206.85	$128.86	$27.33	$156.19
2023	Original	N			$180.08		$562.75	$742.83	$411.68	$218.65	$630.33
2022	Original	N		$877.50	$214.50		$546.00	$1,638.00	$492.76	$352.96	$845.72
2021	Original						$0.00	$0.00	$327.31	$266.20	$593.51
2020	Original						$0.00	$0.00	$0.00	$0.00	$0.00
2019	Original	N			$25.92		$622.08	$648.00	$948.07	$7.02	$955.09
2018	Original	N			$42.84		$224.91	$267.75	$325.53	$35.67	$361.20
2017	Original						$0.00	$0.00	$0.00	$0.00	$0.00
2016	Original	N			$101.25		$0.00	$101.25	$0.00	$173.68	$173.68
2015	Original						$0.00	$0.00	$0.00	$0.00	$0.00
2014	Original						$0.00	$0.00	$0.00	$0.00	$0.00
2013	Original	?			$46.62		$0.00	$46.62	$0.00	$15.91	$15.91
2012	-						-	-	-	$0.00	-
2011	-						-	-	-	$0.00	-
2010	-						-	-	-	$0.00	-
	Totals			$877.50	$640.76	$0.00	$2,133.04	$3,651.30	$2,634.21	$1,097.42	$3,731.63

*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)*
2026	-							
2025	-							
2024	Original	4/15/2025	4/15/2025	4/15/2028	4/15/2028	4/15/2028	$1,947.00	$1,947.00
2023	Original	10/13/2024	4/15/2024	10/13/2027	4/15/2027	10/13/2027	$1,247.00	$1,247.00
2022	Original	9/14/2024	4/15/2023	9/14/2027	4/15/2026	9/14/2027	$936.00	$0.00
2021	Original	4/15/2022	4/15/2022	4/15/2025	4/15/2025	4/15/2025	expired	$0.00
2020	Original	5/10/2021	5/17/2021	5/17/2024	5/17/2024	5/17/2024	expired	$0.00
2019	Original	4/23/2020	7/15/2020	7/15/2023	7/15/2023	7/15/2023	expired	$0.00
2018	Original	10/15/2019	4/15/2019	10/15/2022	4/15/2022	10/15/2022	expired	$1,096.07
2017	Original	4/15/2018	4/15/2018	4/15/2021	4/15/2021	4/15/2021	expired	$0.00
2016	Original	4/15/2017	4/15/2017	4/15/2020	4/15/2020	4/15/2020	expired	$604.93
2015	Original	4/15/2016	4/15/2016	4/15/2019	4/15/2019	4/15/2019	expired	$0.00
2014	Original	9/25/2015	4/15/2015	9/25/2018	4/15/2018	9/25/2018	expired	$0.00
2013	Original	4/15/2014	4/15/2014	4/15/2017	4/15/2017	4/15/2017	expired	$0.00
2012	-							
2011	-							
2010	-							

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

RESOLUTION AND COLLECTION DASHBOARD

Year	Accrued Balance	Return Filed	SFR Filed Date	Final Notice of Intent To Levy Date	Collections Active	Last Activity	Last Activity Date	Estimated CSED IA Payments*	Estimated 72 Mth IA Payments*
2026	-	-						$0.00	
2025	-	-						$0.00	
2024	$3,442.14	Original	none	none	No	Balance due account currently not collectible - not due to hardship	11/26/2025	$41.46	$60.40
2023	$5,981.93	Original	none	none	No	Balance due account currently not collectible - not due to hardship	11/26/2025	$75.39	$104.95
2022	$6,383.72	Original	none	none	No	Balance due account currently not collectible - not due to hardship	11/26/2025	$80.99	$112.01
2021	$2,608.51	Original	none	none	No	Balance due account currently not collectible - not due to hardship	11/26/2025	$42.17	$45.76
2020	$0.00	Original	none	none				$0.00	$0.00
2019	$4,195.09	Original	none	none	No	Balance due account currently not collectible - not due to hardship	11/26/2025	$88.06	$90.07
2018	$603.88	Original	none	none	No	Balance due account currently not collectible - not due to hardship	11/26/2025	$14.73	$15.01
2017	$0.00	Original	none	none				$0.00	$0.00
2016	$0.00	Original	none	5/28/2018		Balance due account currently not collectible - not due to hardship	4/13/2021	$0.00	$0.00
2015	$0.00	Original	none	none				$0.00	$0.00
2014	$0.00	Original	none	none				$0.00	$0.00
2013	$0.00	Original	none	7/31/2015				$0.00	
2012	-	-						$0.00	
2011	-	-						$0.00	
2010	-	-						$0.00	
						Total Estimated IA Payment (Does Not Include SRP)*		$342.80	$428.20

*Includes IRS daily accrued interest of 7% APR.