



This Product Contains Sensitive Taxpayer Data

Account Transcript

Request Date: 03-04-2024
 Response Date: 03-04-2024
 Tracking Number: 105647359618

FORM NUMBER: 1040
 TAX PERIOD: Dec. 31, 2018

TAXPAYER IDENTIFICATION NUMBER: XXX-XX-8928
 SPOUSE TAXPAYER IDENTIFICATION NUMBER: XXX-XX-6363

BEVE JERD & CLAU REES

--- ANY MINUS SIGN SHOWN BELOW SIGNIFIES A CREDIT AMOUNT ---

ACCOUNT BALANCE: 5,385.52
 ACCRUED INTEREST: 1,351.46 AS OF: Mar. 18, 2024
 ACCRUED PENALTY: 998.53 AS OF: Mar. 18, 2024
 ACCOUNT BALANCE PLUS ACCRUALS
 (this is not a payoff amount): 7,735.51

** INFORMATION FROM THE RETURN OR AS ADJUSTED **

EXEMPTIONS: 02
 FILING STATUS: Married Filing Joint
 ADJUSTED GROSS INCOME: 127,013.00
 TAXABLE INCOME: 100,679.00
 TAX PER RETURN: 15,802.00
 SE TAXABLE INCOME TAXPAYER: 0.00
 SE TAXABLE INCOME SPOUSE: 11,596.00
 TOTAL SELF EMPLOYMENT TAX: 1,774.00

RETURN DUE DATE OR RETURN RECEIVED DATE (WHICHEVER IS LATER) Apr. 30, 2020
 PROCESSING DATE May 25, 2020

TRANSACTIONS

CODE	EXPLANATION OF TRANSACTION	CYCLE	DATE	AMOUNT
150	Tax return filed	20201905	05-25-2020	\$15,802.00
n/a	79211-521-92301-0			

806	W-2 or 1099 withholding		04-15-2019	-\$10,254.00
140	Inquiry for non-filing of tax return		12-12-2019	\$0.00
971	Notice issued CP 0059		12-30-2019	\$0.00
166	Penalty for filing tax return after the due date 05-25-2030	20201905	05-25-2020	\$1,248.30
276	Penalty for late payment of tax	20201905	05-25-2020	\$388.36
196	Interest charged for late payment	20201905	05-25-2020	\$403.25
971	Notice issued CP 0014		05-25-2020	\$0.00
971	Tax period blocked from automated levy program		02-15-2021	\$0.00
971	Installment agreement established		06-28-2021	\$0.00
673	Payment		08-30-2021	-\$111.00
672	Removed payment		08-30-2021	\$111.00
673	Payment		09-28-2021	-\$111.00
672	Removed payment		09-28-2021	\$111.00
673	Payment		10-28-2021	-\$111.00
672	Removed payment		10-28-2021	\$111.00
673	Payment		11-29-2021	-\$111.00
672	Removed payment		11-29-2021	\$111.00
673	Payment		12-28-2021	-\$111.00
672	Removed payment		12-28-2021	\$111.00
670	Payment		02-25-2022	-\$22.00
670	Payment		03-25-2022	-\$111.00
672	Removed payment CIVIL PENALTY 202201		02-25-2022	\$89.00
673	Payment		02-25-2022	-\$89.00
670	Payment		04-26-2022	-\$111.00
670	Payment		05-24-2022	-\$68.00
670	Payment		07-08-2022	-\$111.00
670	Payment		07-29-2022	-\$111.00
672	Removed payment CIVIL PENALTY 202201		05-24-2022	\$43.00
673	Payment		05-24-2022	-\$43.00
670	Payment		08-29-2022	-\$111.00
670	Payment		09-23-2022	-\$111.00
670	Payment		10-21-2022	-\$111.00
670	Payment		11-25-2022	-\$111.00
670	Payment		01-30-2023	-\$111.00

670	Payment	05-01-2023	-\$111.00
706	Credit transferred in from 1040 202212	04-15-2023	-\$447.39
971	Notice issued CP 0039	05-22-2023	\$0.00
670	Payment	07-03-2023	-\$111.00
670	Payment	09-19-2023	-\$111.00
670	Payment	10-06-2023	-\$111.00
670	Payment	11-10-2023	-\$111.00
670	Payment	02-23-2024	-\$111.00

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