



This Product Contains Sensitive Taxpayer Data

Account Transcript

Request Date: 03-04-2024
 Response Date: 03-04-2024
 Tracking Number: 105646427968

FORM NUMBER: 1040
 TAX PERIOD: Dec. 31, 2020

TAXPAYER IDENTIFICATION NUMBER: XXX-XX-5359
 SPOUSE TAXPAYER IDENTIFICATION NUMBER: XXX-XX-9415

WALT BARB & DAPH LANS

<<<<POWER OF ATTORNEY/TAX INFORMATION AUTHORIZATION (POA/TIA) ON FILE>>>>

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

ACCOUNT BALANCE: 1,913.72
 ACCRUED INTEREST: 287.35 AS OF: Mar. 18, 2024
 ACCRUED PENALTY: 0.00 AS OF: Mar. 18, 2024

ACCOUNT BALANCE PLUS ACCRUALS
 (this is not a payoff amount): 2,201.07

** INFORMATION FROM THE RETURN OR AS ADJUSTED **

EXEMPTIONS: 03
 FILING STATUS: Married Filing Joint
 ADJUSTED GROSS INCOME: 83,782.00
 TAXABLE INCOME: 47,186.00
 TAX PER RETURN: 3,266.00
 SE TAXABLE INCOME TAXPAYER: 0.00
 SE TAXABLE INCOME SPOUSE: 0.00
 TOTAL SELF EMPLOYMENT TAX: 0.00

RETURN DUE DATE OR RETURN RECEIVED DATE (WHICHEVER IS LATER) Sep. 15, 2021
 PROCESSING DATE Oct. 25, 2021

TRANSACTIONS

CODE	EXPLANATION OF TRANSACTION	CYCLE	DATE	AMOUNT
150	Tax return filed	20213805	10-25-2021	\$3,266.00
n/a	76221-658-11074-1			

806	W-2 or 1099 withholding		04-15-2021	-\$434.00
960	Appointed representative		06-09-2020	\$0.00
766	Tax relief credit		12-28-2020	-\$1,200.00
766	Credit to your account		12-28-2020	-\$500.00
846	Refund issued		12-18-2020	\$1,700.00
290	Additional tax assessed	20205005	12-28-2020	\$0.00
	00-00-0000			
n/a	89254-999-05099-0			
971	Notice issued		12-28-2020	\$0.00
	NOTICE1444			
766	Tax relief credit		01-18-2021	-\$1,200.00
766	Credit to your account		01-18-2021	-\$600.00
846	Refund issued		01-06-2021	\$1,800.00
290	Additional tax assessed	20205302	01-18-2021	\$0.00
	00-00-0000			
n/a	89254-999-05055-0			
460	Extension of time to file tax return ext. Date 10-15-2021		05-11-2021	\$0.00
170	Penalty for not pre-paying tax	20214005	10-25-2021	\$44.00
	10-25-2031			
196	Interest charged for late payment	20214005	10-25-2021	\$37.72
971	Notice issued		10-25-2021	\$0.00
	CP 0014			
610	Payment with return		10-19-2021	-\$1,000.00
971	Installment agreement established		11-06-2021	\$0.00

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