

## **TAX RETURN TRANSCRIPT**

SSN PROVIDED: XXX-XX-XXXX

TAX PERIOD ENDING: Dec 31, 2015

TRACKING NUMBER: XXXXXXXX

REQUEST DATE: 04-15-2016

RESPONSE DATE: 04-15-2016

THE INFORMATION LISTED BELOW REFLECTS DETAILS REPORTED ON THE TAX RETURN FOR THE REQUESTED TAX PERIOD ENDING DATE SHOWN ABOVE. THE INFORMATION DOES NOT INCLUDE CHANGES AFTER THE RESPONSE DATE SHOWN ABOVE.

### **GENERAL INFORMATION**

SSN: XXX-XX-XXXX

SPOUSE SSN: XXX-XX-XXXX

NAME(S) SHOWN ON RETURN:

ADDRESS:

FILING STATUS:

DEPENDENT 1 NAME CTRL:

DEPENDENT 1SSN: XXX-XX-XXXX

DEPENDENT 2 NAME CTRL:

DEPENDENT 2SSN: XXX-XX-XXXX

DEPENDENT 3 NAME CTRL:

DEPENDENT 3SSN: XXX-XX-XXXX

DEPENDENT 4 NAME CTRL:

DEPENDENT 4SSN: XXX-XX-XXXX

TOTAL NUMBER OF EXEMPTIONS:

### **SUMMARY**

INCOME (SCHEDULE 1):	75,500
ADJUSTMENTS TO INCOME (SCHEDULE 2):	<u>(2,000)</u>
ADJUSTED GROSS INCOME:	73,500
STANDARD/ITEMIZED DEDUCTION (SCHEDULE 3):	(14,000)
EXEMPTIONS:	<u>(12,000)</u>
TAXABLE INCOME:	47,500
TENTATIVE TAX:	(6,200)
OTHER TAXES (SCHEDULE 4):	<u>0</u>
TOTAL TAXES:	(6,200)
CREDITS (SCHEDULE 5):	1,200
FEDERAL PAYMENTS (SCHEDULE 6):	<u>7,050</u>
FEDERAL REFUND/(AMOUNT DUE):	2,050
APPLIED TO NEXT YEAR'S ESTIMATED TAX:	0
YOUR REFUND AMOUNT:	2,050
REFUND DATE / DEPOSIT DATE:	05-01-16
ESTIMATED TAX PENALTY:	0
ACCOUNT BALANCE:	0
ACCRUED INTEREST:	0
ACCRUED PENALTY:	0
ACCOUNT BALANCE PLUS ACCRUALS:	0

**SCHEDULE 1 - INCOME**

	<b><u>TAXABLE</u></b>	<b><u>GROSS</u></b>
WAGES, SALARIES, TIPS, ETC:	67,390	67,390
TAXABLE INTEREST INCOME: SCH B:	160	160
TAX-EXEMPT INTEREST:	0	500
ORDINARY DIVIDEND INCOME: SCH B:	400	400
REFUNDS OF STATE/LOCAL TAXES:	50	50
ALIMONY RECEIVED:	0	0
BUSINESS INCOME OR LOSS (SCHEDULE C):	0	0
CAPITAL GAIN OR LOSS: (SCHEDULE D):	0	0
CAPITAL GAIN OR LOSS (FORM 4797):	0	0
IRA DISTRIBUTIONS:	2,500	3,000
PENSION AND ANNUITIES:	0	2,000
RENT/ROYALTY INCOME/LOSS PER COMPUTER:	0	0
ESTATE/TRUST INCOME/LOSS PER COMPUTER:	0	0
PARTNERSHIPS/S-CORP INCOME/LOSS PER COMPUTER:	0	0
FARM INCOME OR LOSS (SCHEDULE F):	0	0
UNEMPLOYMENT COMPENSATION:	0	0
TOTAL SOCIAL SECURITY BENEFITS:	5,000	6,000
OTHER INCOME:	<u>0</u>	<u>0</u>
<b>TOTAL INCOME:</b>	<b>75,500</b>	<b>79,500</b>

**SCHEDULE 2 - ADJUSTMENTS TO INCOME**

EDUCATOR EXPENSES:	0
RESERVIST AND OTHER BUSINESS EXPENSES:	0
HEALTH SAVINGS ACCT DEDUCTION:	2,000
MOVING EXPENSES: F3903:	0
SELF EMPLOYMENT TAX DEDUCTION:	0
KEOGH/SEP CONTRIBUTION DEDUCTION:	0
SELF-EMP HEALTH INS DEDUCTION:	0
EARLY WITHDRAWAL OF SAVINGS PENALTY:	0
ALIMONY PAID:	0
IRA DEDUCTION:	0
STUDENT LOAN INTEREST DEDUCTION:	0
TUITION AND FEES DEDUCTION:	0
DOMESTIC PRODUCTION ACTIVITIES DEDUCTION:	0
ARCHER MSA DEDUCTION:	<u>0</u>
<b>TOTAL ADJUSTMENTS:</b>	<b>2,000</b>

**SCHEDULE 3 – STANDARD/ITEMIZED DEDUCTION**

**Note – taxpayer deducts itemized or standard deduction whichever is higher**

ITEMIZED DEDUCTION (SCHEDULE A):	14,000
STANDARD DEDUCTION PER COMPUTER:	13,600
ADDITIONAL STANDARD DEDUCTION PER COMPUTER:	0

**SCHEDULE 4 - OTHER TAXES:**

FORM 8814 ADDITIONAL TAX AMOUNT:	0
TAX ON INCOME LESS SOC SEC INCOME PER COMPUTER:	0
FORM 6251 ALTERNATIVE MINIMUM TAX:	0
EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT:	0
SE TAX:	0
SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS:	0
TAX ON QUALIFIED PLANS F5329 (PR):	0
HOUSEHOLD EMPLOYMENT TAXES:	0
HEALTHCARE: INDIVIDUAL RESPONSIBILITY:	0
UNPAID FICA ON REPORTED TIPS:	0
RECAPTURE TAXES:	0
FIRST TIME HOMEBUYER CREDIT REPAYMENT AMOUNT:	0
OTHER TAXES:	<u>0</u>
<b>TOTAL OTHER TAXES:</b>	<b>0</b>

**SCHEDULE 5 - CREDITS:**

FOREIGN TAX CREDIT:	0
CHILD & DEPENDENT CARE CREDIT:	0
CREDIT FOR ELDERLY AND DISABLED:	0
EDUCATION CREDIT:	0
RETIREMENT SAVINGS CNTRB CREDIT:	0
CHILD TAX CREDIT:	1,000
RESIDENTIAL ENERGY CREDIT:	200
ADOPTION CREDIT: F8839:	0
FORM 8369 MORTGAGE CERTIFICATE CREDIT:	0
FORM 3800 GENERAL BUSINESS CREDITS:	0
PRIOR YR MIN TAX CREDIT: F8801:	0
F8936 ELECTRIC MOTOR VEHICLE CREDIT AMOUNT:	0
F8910 ALTERNATIVE MOTOR VEHICLE CREDIT AMOUNT:	0
EARNED INCOME CREDIT:	0
REFUNDABLE EDUCATION CREDIT:	0
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER:	0
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT:	0
PREMIUM TAX CREDIT AMOUNT:	0
FORM 2439 REGULATED INVESTMENT COMPANY CREDIT:	0
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS:	0
HEALTH COVERAGE TX CR: F8885:	0
OTHER CREDITS:	<u>0</u>
<b>TOTAL CREDITS:</b>	<b>1,200</b>

**SCHEDULE 6 - FEDERAL PAYMENTS:**

FEDERAL INCOME TAX WITHHELD:	7,050
ESTIMATED TAX PAYMENTS:	0
EXCESS SOCIAL SECURITY & RRTA TAX WITHHELD:	0
AMOUNT PAID WITH FORM 4868:	<u>0</u>
<b>TOTAL PAYMENTS:</b>	<b>7,050</b>

**OTHER INFORMATION:**

FORM NUMBER:  
RECEIVED DATE:  
PREPARER NAME:  
THIRD PARTY DESIGNEE NAME:

**SCHEDULE A – ITEMIZED DEDUCTIONS**

NET MEDICAL DEDUCTION:	0
STATE AND LOCAL INCOME TAXES:	4,000
INCOME TAX OR GENERAL SALES TAX:	0
REAL ESTATE TAXES:	1,500
PERSONAL PROPERTY TAXES:	100
OTHER TAXES AMOUNT:	0
MORTGAGE INTEREST (FINANCIAL):	6,000
MORTGAGE INTEREST (INDIVIDUAL):	0
DEDUCTIBLE POINTS:	0
QUALIFIED MORTGAGE INSURANCE PREMIUMS:	0
DEDUCTIBLE INVESTMENT INTEREST:	0
CASH CONTRIBUTIONS:	2,400
OTHER THAN CASH: FORM 8283:	0
CARRYOVER FROM PRIOR YEAR:	0
CASUALTY OR THEFT LOSS:	0
UNREIMBURSED EMPLOYEE EXPENSE AMOUNT:	0
OTHER THAN GAMBLING AMOUNT:	0
OTHER MISC DEDUCTIONS:	<u>0</u>
<b>TOTAL ITEMIZED DEDUCTIONS:</b>	<b>14,000</b>

**SCHEDULE C – PROFIT OR LOSS FROM BUSINESS**

BUSINESS NAME:	XXXXXXXXX
GROSS RECEIPTS OR SALES:	0
RETURNS AND ALLOWANCES:	0
NET GROSS RECEIPTS:	0
COST OF GOODS SOLD:	0
OTHER INCOME:	0
CAR AND TRUCK EXPENSES:	0
DEPRECIATION:	0
INSURANCE (OTHER THAN HEALTH):	0
MORTGAGE INTEREST:	0

LEGAL AND PROFESSIONAL SERVICES:	0
REPAIRS AND MAINTENANCE:	0
TRAVEL:	0
MEALS AND ENTERTAINMENT:	0
WAGES:	0
OTHER EXPENSES:	0
EXP FOR BUSINESS USE OF HOME:	<u>0</u>
<b>SCH C NET PROFIT OR LOSS PER COMPUTER:</b>	<b>0</b>