



This Product Contains Sensitive Taxpayer Data

Request Date: 10-18-2022
Response Date: 10-18-2022
Tracking Number: 102812612581

Tax Return Transcript

SSN Provided: XXX-XX-2548
Tax Period Ending: Dec. 31, 2020

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: XXX-XX-2548
SPOUSE SSN: XXX-XX-1645

NAME(S) SHOWN ON RETURN: MELI R & BRAD S BERN

ADDRESS: 610 DO

FILING STATUS: Married Filing Joint
FORM NUMBER: 1040
CYCLE POSTED: 20211305
RECEIVED DATE: Apr.15, 2021
REMITTANCE: \$0.00
EXEMPTION NUMBER: 3
DEPENDENT 1 NAME CTRL: BERN
DEPENDENT 1 SSN: XXX-XX-1710
DEPENDENT 2 NAME CTRL:
DEPENDENT 2 SSN:
DEPENDENT 3 NAME CTRL:
DEPENDENT 3 SSN:
DEPENDENT 4 NAME CTRL:
DEPENDENT 4 SSN:
PTIN:
PREPARER EIN:

Income

WAGES, SALARIES, TIPS, ETC:.....\$36,872.00
TAXABLE INTEREST INCOME: SCH B:.....\$0.00
TAX-EXEMPT INTEREST:.....\$0.00
ORDINARY DIVIDEND INCOME: SCH B:.....\$0.00
QUALIFIED DIVIDENDS:.....\$0.00
REFUNDS OF STATE/LOCAL TAXES:.....\$0.00
ALIMONY RECEIVED:.....\$0.00
BUSINESS INCOME OR LOSS (Schedule C):.....\$0.00
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:.....\$0.00
CAPITAL GAIN OR LOSS: (Schedule D):.....\$0.00
CAPITAL GAINS OR LOSS: SCH D PER COMPUTER:.....\$0.00
OTHER GAINS OR LOSSES (Form 4797):.....\$0.00
TOTAL IRA DISTRIBUTIONS:.....\$0.00
TAXABLE IRA DISTRIBUTIONS:.....\$0.00
TOTAL PENSIONS AND ANNUITIES:.....\$0.00
TAXABLE PENSION/ANNUITY AMOUNT:.....\$0.00

ADDITIONAL INCOME:	\$14,532.00
ADDITIONAL INCOME PER COMPUTER:	\$14,532.00
REFUNDABLE CREDITS PER COMPUTER:	\$1,052.00
REFUNDABLE EDUCATION CREDIT PER COMPUTER:	\$0.00
QUALIFIED BUSINESS INCOME DEDUCTION:	\$0.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E):	\$0.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E) PER COMPUTER:	\$0.00
RENT/ROYALTY INCOME/LOSS PER COMPUTER:	\$0.00
ESTATE/TRUST INCOME/LOSS PER COMPUTER:	\$0.00
PARTNERSHIP/S-CORP INCOME/LOSS PER COMPUTER:	\$0.00
FARM INCOME OR LOSS (Schedule F):	\$0.00
FARM INCOME OR LOSS (Schedule F) PER COMPUTER:	\$0.00
UNEMPLOYMENT COMPENSATION:	\$14,532.00
TOTAL SOCIAL SECURITY BENEFITS:	\$0.00
TAXABLE SOCIAL SECURITY BENEFITS:	\$0.00
TAXABLE SOCIAL SECURITY BENEFITS PER COMPUTER:	\$0.00
OTHER INCOME:	\$0.00
SCHEDULE EIC SE INCOME PER COMPUTER:	\$0.00
SCHEDULE EIC EARNED INCOME PER COMPUTER:	\$36,872.00
SCH EIC DISQUALIFIED INC COMPUTER:	\$0.00
QUALIFIED BUSINESS INCOME DEDUCTION:	\$0.00
F8995 QUALIFIED BUSINESS INCOME DEDUCTION COMPUTER:	\$0.00
PRIMARY ECONOMIC IMPACT PAYMENT:	\$1,450.00
SECONDARY ECONOMIC IMPACT PAYMENT:	\$1,450.00
SCHOLARSHIP FELLOWSHIP GRANT:	\$0.00
TOTAL INCOME:	\$51,404.00
TOTAL INCOME PER COMPUTER:	\$51,404.00

Adjustments to Income

EDUCATOR EXPENSES:	\$0.00
EDUCATOR EXPENSES PER COMPUTER:	\$0.00
RESERVIST AND OTHER BUSINESS EXPENSE:	\$0.00
HEALTH SAVINGS ACCT DEDUCTION:	\$0.00
HEALTH SAVINGS ACCT DEDUCTION PER COMPTR:	\$0.00
MOVING EXPENSES: F3903:	\$0.00
SELF EMPLOYMENT TAX DEDUCTION:	\$0.00
SELF EMPLOYMENT TAX DEDUCTION PER COMPUTER:	\$0.00
SELF EMPLOYMENT TAX DEDUCTION VERIFIED:	\$0.00
KEOGH/SEP CONTRIBUTION DEDUCTION:	\$0.00
SELF-EMP HEALTH INS DEDUCTION:	\$0.00
EARLY WITHDRAWAL OF SAVINGS PENALTY:	\$0.00
ALIMONY PAID SSN:	
ALIMONY PAID:	\$0.00
SCHOLARSHIP FELLOWSHIP EXCLUDED:	\$0.00
IRA DEDUCTION:	\$0.00
IRA DEDUCTION PER COMPUTER:	\$0.00
STUDENT LOAN INTEREST DEDUCTION:	\$0.00
STUDENT LOAN INTEREST DEDUCTION PER COMPUTER:	\$0.00
STUDENT LOAN INTEREST DEDUCTION VERIFIED:	\$0.00
TUITION AND FEES DEDUCTION:	\$2,099.00
TUITION AND FEES DEDUCTION PER COMPUTER:	\$2,099.00
DOMESTIC PRODUCTION ACTIVITIES DEDUCTION:	\$0.00
OTHER ADJUSTMENTS:	\$0.00
ARCHER MSA DEDUCTION:	\$0.00
ARCHER MSA DEDUCTION PER COMPUTER:	\$0.00
TOTAL ADJUSTMENTS:	\$2,199.00
TOTAL ADJUSTMENTS PER COMPUTER:	\$2,199.00
ADJUSTED GROSS INCOME:	\$49,205.00
ADJUSTED GROSS INCOME PER COMPUTER:	\$49,205.00

Tax and Credits

65-OR-OVER:.....	NO
BLIND:.....	NO
SPOUSE 65-OR-OVER:.....	NO
SPOUSE BLIND:.....	NO
STANDARD DEDUCTION PER COMPUTER:.....	\$24,800.00
ADDITIONAL STANDARD DEDUCTION PER COMPUTER:.....	\$0.00
TAX TABLE INCOME PER COMPUTER:.....	\$24,405.00
EXEMPTION AMOUNT PER COMPUTER:.....	\$0.00
TAXABLE INCOME:.....	\$24,405.00
TAXABLE INCOME PER COMPUTER:.....	\$24,405.00
TOTAL POSITIVE INCOME PER COMPUTER:.....	\$51,404.00
TENTATIVE TAX:.....	\$2,536.00
TENTATIVE TAX PER COMPUTER:.....	\$2,536.00
FORM 8814 ADDITIONAL TAX AMOUNT:.....	\$0.00
TAX ON INCOME LESS SOC SEC INCOME PER COMPUTER:.....	\$0.00
FORM 6251 ALTERNATIVE MINIMUM TAX:.....	\$0.00
FORM 6251 ALTERNATIVE MINIMUM TAX PER COMPUTER:.....	\$0.00
FOREIGN TAX CREDIT:.....	\$0.00
FOREIGN TAX CREDIT PER COMPUTER:.....	\$0.00
FOREIGN INCOME EXCLUSION PER COMPUTER:.....	\$0.00
FOREIGN INCOME EXCLUSION TAX PER COMPUTER:.....	\$0.00
EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT:.....	\$912.00
EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT VERIFIED AMOUNT:.....	\$0.00
CHILD & DEPENDENT CARE CREDIT:.....	\$0.00
CHILD & DEPENDENT CARE CREDIT PER COMPUTER:.....	\$0.00
CREDIT FOR ELDERLY AND DISABLED:.....	\$0.00
CREDIT FOR ELDERLY AND DISABLED PER COMPUTER:.....	\$0.00
EDUCATION CREDIT:.....	\$1,500.00
EDUCATION CREDIT PER COMPUTER:.....	\$1,500.00
GROSS EDUCATION CREDIT PER COMPUTER:.....	\$1,500.00
RETIREMENT SAVINGS CNTRB CREDIT:.....	\$0.00
RETIREMENT SAVINGS CNTRB CREDIT PER COMPUTER:.....	\$0.00
PRIM RET SAV CNTRB: F8880 LN6A:.....	\$0.00
SEC RET SAV CNTRB: F8880 LN6B:.....	\$0.00
TOTAL RETIREMENT SAVINGS CONTRIBUTION: F8880 CMPTR:.....	\$0.00
RESIDENTIAL ENERGY CREDIT:.....	\$0.00
RESIDENTIAL ENERGY CREDIT PER COMPUTER:.....	\$0.00
CHILD AND OTHER DEPENDENT CREDIT:.....	\$1,948.00
CHILD AND OTHER DEPENDENT CREDIT PER COMPUTER:.....	\$1,948.00
ADOPTION CREDIT: F8839:.....	\$0.00
ADOPTION CREDIT PER COMPUTER:.....	\$0.00
FORM 8396 MORTGAGE CERTIFICATE CREDIT:.....	\$0.00
FORM 8396 MORTGAGE CERTIFICATE CREDIT PER COMPUTER:.....	\$0.00
F3800, F8801 AND OTHER CREDIT AMOUNT:.....	\$0.00
FORM 3800 GENERAL BUSINESS CREDITS:.....	\$0.00
FORM 3800 GENERAL BUSINESS CREDITS PER COMPUTER:.....	\$0.00
PRIOR YR MIN TAX CREDIT: F8801:.....	\$0.00
PRIOR YR MIN TAX CREDIT: F8801 PER COMPUTER:.....	\$0.00
F8936 ELECTRIC MOTOR VEHICLE CREDIT AMOUNT:.....	\$0.00
F8936 ELECTRIC MOTOR VEHICLE CREDIT PER COMPUTER:.....	\$0.00
F8910 ALTERNATIVE MOTOR VEHICLE CREDIT AMOUNT:.....	\$0.00
F8910 ALTERNATIVE MOTOR VEHICLE CREDIT PER COMPUTER:.....	\$0.00
SICK FAMILY LEAVE CREDIT:.....	\$0.00
NON ITEMIZED CHARITABLE CONTRIBUTION DEDUCTION:.....	\$100.00
RECOVERY REBATE CREDIT:.....	\$500.00
RECOVERY REBATE CREDIT PER COMPUTER:.....	\$0.00
RECOVERY REBATE CREDIT VERIFIED:.....	\$0.00
OTHER CREDITS:.....	\$0.00
TOTAL CREDITS:.....	\$3,448.00
TOTAL CREDITS PER COMPUTER:.....	\$3,448.00
INCOME TAX AFTER CREDITS PER COMPUTER:.....	\$0.00

Other Taxes

SE TAX:.....	\$0.00
SE TAX PER COMPUTER:.....	\$0.00
SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS:.....	\$0.00
SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS PER COMPUTER:.....	\$0.00
TAX ON QUALIFIED PLANS F5329 (PR):.....	\$0.00
TAX ON QUALIFIED PLANS F5329 PER COMPUTER:.....	\$0.00
IRAF TAX PER COMPUTER:.....	\$0.00
TP TAX FIGURES (REDUCED BY IRAF) PER COMPUTER:.....	\$0.00
IMF TOTAL TAX (REDUCED BY IRAF) PER COMPUTER:.....	\$0.00
TOTAL OTHER TAXES PER COMPUTER:.....	\$0.00
UNPAID FICA ON REPORTED TIPS:.....	\$0.00
F8959-8960 OTHER TAXES:.....	\$0.00
TOTAL OTHER TAXES:.....	\$0.00
RECAPTURE TAX: F8611:.....	\$0.00
HOUSEHOLD EMPLOYMENT TAXES:.....	\$0.00
HOUSEHOLD EMPLOYMENT TAXES PER COMPUTER:.....	\$0.00
IRC 453 TAX:.....	\$0.00
HEALTH CARE RESPONSIBILITY PENALTY:.....	\$0.00
HEALTH CARE RESPONSIBILITY PENALTY VERIFIED:.....	\$0.00
HEALTH COVERAGE RECAPTURE: F8885:.....	\$0.00
DEFERRED TAX SCH H SE:.....	\$0.00
MAX DEFERRED TAX PER COMPUTER:.....	\$0.00
RECAPTURE TAXES:.....	\$0.00
TOTAL ASSESSMENT PER COMPUTER:.....	\$0.00
TOTAL TAX LIABILITY TP FIGURES:.....	\$0.00
TOTAL TAX LIABILITY TP FIGURES PER COMPUTER:.....	\$0.00

Payments

FEDERAL INCOME TAX WITHHELD:.....	\$2,751.00
HEALTH CARE: INDIVIDUAL RESPONSIBILITY:.....	\$0.00
HEALTH CARE FULL-YEAR COVERAGE INDICATOR:.....	0
ESTIMATED TAX PAYMENTS:.....	\$0.00
OTHER PAYMENT CREDIT:.....	\$0.00
REFUNDABLE EDUCATION CREDIT:.....	\$1,000.00
REFUNDABLE EDUCATION CREDIT PER COMPUTER:.....	\$1,000.00
REFUNDABLE EDUCATION CREDIT VERIFIED:.....	\$0.00
REFUNDABLE CREDITS:.....	\$1,552.00
EARNED INCOME CREDIT:.....	\$0.00
EARNED INCOME CREDIT PER COMPUTER:.....	\$0.00
EARNED INCOME CREDIT NONTAXABLE COMBAT PAY:.....	\$0.00
SCHEDULE 8812 NONTAXABLE COMBAT PAY:.....	\$0.00
EXCESS SOCIAL SECURITY & RRTA TAX WITHHELD:.....	\$0.00
SCHEDULE 8812 TOT SS/MEDICARE WITHHELD:.....	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT:.....	\$52.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT PER COMPUTER:.....	\$52.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT VERIFIED:.....	\$0.00
AMOUNT PAID WITH FORM 4868:.....	\$0.00
FORM 2439 REGULATED INVESTMENT COMPANY CREDIT:.....	\$0.00
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS:.....	\$0.00
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS PER COMPUTER:.....	\$0.00
HEALTH COVERAGE TX CR: F8885:.....	\$0.00
SEC 965 TAX INSTALLMENT:.....	\$0.00
SEC 965 TAX LIABILITY:.....	\$0.00
PREMIUM TAX CREDIT AMOUNT:.....	\$0.00
PREMIUM TAX CREDIT VERIFIED AMOUNT:.....	\$0.00
PRIMARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:.....	\$0.00
SECONDARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:.....	\$0.00
FIRST TIME HOMEBUYER CREDIT REPAYMENT AMOUNT:.....	\$0.00
FORM 5405 TOTAL HOMEBUYERS CREDIT REPAYMENT PER COMPUTER:.....	\$0.00
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER:.....	\$0.00
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER (2):.....	\$0.00

FORM 2439 AND OTHER CREDITS:.....\$0.00
TOTAL PAYMENTS:.....\$4,303.00
TOTAL PAYMENTS PER COMPUTER:.....\$3,803.00

Refund or Amount Owed

REFUND AMOUNT:.....\$-4,303.00
APPLIED TO NEXT YEAR'S ESTIMATED TAX:.....\$0.00
ESTIMATED TAX PENALTY:.....\$0.00
TAX ON INCOME LESS STATE REFUND PER COMPUTER:.....\$0.00
BAL DUE/OVER PYMT USING TP FIG PER COMPUTER:.....\$-4,303.00
BAL DUE/OVER PYMT USING COMPUTER FIGURES:.....\$-3,803.00
FORM 8888 TOTAL REFUND PER COMPUTER:.....\$0.00

Third Party Designee

THIRD PARTY DESIGNEE ID NUMBER:.....
AUTHORIZATION INDICATOR:.....0
THIRD PARTY DESIGNEE NAME:.....

Form 8863 - Education Credits (Hope and Lifetime Learning Credits)

Part I - EDUCATION CREDITS

STUDENT 1 NAME CNTRL:.....BERN
STUDENT 1 SSN:.....XXX-XX-1645
STUDENT 2 NAME CNTRL:.....
STUDENT 2 SSN:.....
STUDENT 3 NAME CNTRL:.....
STUDENT 3 SSN:.....
TENTATIVE CREDIT AMOUNT:.....\$2,500.00

PART II - LIFETIME LEARNING CREDITS

TOTL LIFETIM LRNING CR QLFD EXP:.....\$0.00
EDUCATIONAL INSTITUTION FEDERAL ID NUMBER STUDENT 1:.....XXXXX1010
SECOND EDUCATIONAL INSTITUTION FEDERAL ID NUMBER, STUDENT 1:.....000000000
EDUCATIONAL INSTITUTION FEDERAL ID NUMBER STUDENT 2:.....000000000
SECOND EDUCATIONAL INSTITUTION FEDERAL ID NUMBER STUDENT 2:.....000000000
EDUCATIONAL INSTITUTION FEDERAL ID NUMBER STUDENT 3:.....000000000
SECOND EDUCATIONAL INSTITUTION FEDERAL ID NUMBER STUDENT 3:.....000000000
PRIOR YEAR HOPE SCHOLARSHIP OR AOT CREDIT CLAIMED STUDENT 1:.....NO
ACADEMIC ELIGIBILITY, STUDENT 1:.....YES
POST-SECONDARY COMPLETE STUDENT 1:.....NO
FELONY CONVICTION STUDENT 1:.....NO
PRIOR YEAR HOPE SCHOLARSHIP OR AOT CREDIT CLAIMED STUDENT 2:.....NONE
ACADEMIC ELIGIBILITY STUDENT 2:.....NONE
POST-SECONDARY COMPLETE STUDENT 2:.....NONE
FELONY CONVICTION STUDENT 2:.....NONE
PRIOR YEAR HOPE SCHOLARSHIP OR AOT CREDIT CLAIMED STUDENT 3:.....NONE
ACADEMIC ELIGIBILITY STUDENT 3:.....NONE
POST-SECONDARY COMPLETE STUDENT 3:.....NONE
FELONY CONVICTION STUDENT 3:.....NONE
VERIFIED NUMBER OF EDUCATION CREDIT ELIGIBLE STUDENTS:.....
TOTL LIFETIM LRNING CR QLFD EXP PER COMPUTER:.....\$0.00

PART III - ALLOWABLE EDUCATION CREDITS

GROSS EDUCATION CR PER COMPUTER:.....\$1,500.00
TOTAL EDUCATION CREDIT AMOUNT:.....\$1,500.00
TOTAL EDUCATION CREDIT AMOUNT PER COMPUTER:.....\$1,500.00

Form 8917 - Tuition and Fees Deduction

STUDENT NAME CONTROL:.....BERN
STUDENT SSN:.....XXX-XX-2548
ADJUSTED STUDENT QUALIFIED EXPENSES:.....\$2,099.00

Form 8962

Married Filing Separately Premium Tax Credit Exception Checkbox Indicator:...0
FEDERAL POVERTY LEVEL CHECKBOX:.....C
DEPENDENTS' MODIFIED AGI:.....\$0.00
MONTHLY CONTRIBUTION FOR HEALTH CARE:.....\$310.00
ANNUAL PREMIUM:.....\$0.00
ANNUAL PREMIUM SLCSP:.....\$0.00
ANNUAL ADVANCE PAYMENT OF PTC:.....\$0.00
JANUARY MONTHLY PREMIUM:.....\$0.00
JANUARY MONTHLY PREMIUM SLCSP:.....\$0.00
JANUARY MONTHLY ADVANCE PTC:.....\$0.00
FEBRUARY MONTHLY PREMIUM:.....\$0.00
FEBRUARY MONTHLY PREMIUM SLCSP:.....\$0.00
FEBRUARY MONTHLY ADVANCE PTC:.....\$0.00
MARCH MONTHLY PREMIUM:.....\$0.00
MARCH MONTHLY PREMIUM SLCSP:.....\$0.00
MARCH MONTHLY ADVANCE PTC:.....\$0.00
APRIL MONTHLY PREMIUM:.....\$0.00
APRIL MONTHLY PREMIUM SLCSP:.....\$0.00
APRIL MONTHLY ADVANCE PTC:.....\$0.00
MAY MONTHLY PREMIUM:.....\$0.00
MAY MONTHLY PREMIUM SLCSP:.....\$0.00
MAY MONTHLY ADVANCE PTC:.....\$0.00
JUNE MONTHLY PREMIUM:.....\$0.00
JUNE MONTHLY PREMIUM SLCSP:.....\$0.00
JUNE MONTHLY ADVANCE PTC:.....\$0.00
JULY MONTHLY PREMIUM:.....\$452.00
JULY MONTHLY PREMIUM SLCSP:.....\$599.00
JULY MONTHLY ADVANCE PTC:.....\$441.00
AUGUST MONTHLY PREMIUM:.....\$452.00
AUGUST MONTHLY PREMIUM SLCSP:.....\$599.00
AUGUST MONTHLY ADVANCE PTC:.....\$441.00
SEPTEMBER MONTHLY PREMIUM:.....\$452.00
SEPTEMBER MONTHLY PREMIUM SLCSP:.....\$599.00
SEPTEMBER MONTHLY ADVANCE PTC:.....\$441.00
OCTOBER MONTHLY PREMIUM:.....\$452.00
OCTOBER MONTHLY PREMIUM SLCSP:.....\$599.00
OCTOBER MONTHLY ADVANCE PTC:.....\$441.00
NOVEMBER MONTHLY PREMIUM:.....\$452.00
NOVEMBER MONTHLY PREMIUM SLCSP:.....\$599.00
NOVEMBER MONTHLY ADVANCE PTC:.....\$441.00
DECEMBER MONTHLY PREMIUM:.....\$452.00
DECEMBER MONTHLY PREMIUM SLCSP:.....\$599.00
DECEMBER MONTHLY ADVANCE PTC:.....\$441.00
TOTAL PREMIUM TAX CREDIT:.....\$1,734.00
NET PREMIUM TAX CREDIT:.....\$2,646.00

This Product Contains Sensitive Taxpayer Data