

This Product Contains Sensitive Taxpayer Data

Request Date: 10-21-2022 Response Date: 10-21-2022 Tracking Number: 102830189892

Record of Account

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

TAXPAYER IDENTIFICATION NUMBER: XXX-XX-2548 SPOUSE TAXPAYER IDENTIFICATION NUMBER: XXX-XX-1645

MELI R & BRAD S BERN

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

ACCOUNT BALANCE: 0.00

ACCRUED INTEREST: 0.00 AS OF: Jun. 06, 2022 ACCRUED PENALTY: 0.00 AS OF: Jun. 06, 2022

ACCOUNT BALANCE
PLUS ACCRUALS
(this is not a

payoff amount): 0.00

\*\* INFORMATION FROM THE RETURN OR AS ADJUSTED \*\*

EXEMPTIONS: 03

FILING STATUS: Married Filing Joint

ADJUSTED GROSS

INCOME: 39,005.00
TAXABLE INCOME: 14,205.00
TAX PER RETURN: 0.00

SE TAXABLE INCOME

TAXPAYER: 0.00

SE TAXABLE INCOME

846 Refund issued

SPOUSE: 0.00

TOTAL SELF

EMPLOYMENT TAX: 0.00

RETURN DUE DATE OR RETURN RECEIVED DATE (WHICHEVER IS LATER) Apr. 15, 2021
PROCESSING DATE Apr. 19, 2021

TRANSACTIONS

CODE	EXPLANATION OF TRANSACTION	CYCLE	DATE	AMOUNT		
150	Tax return filed	20211305	04-19-2021	\$0.00		
	79211-446-35176-1					
806	W-2 or 1099 withholding		04-15-2021	-\$2 <b>,</b> 751.00		
				, ,		
766	Tax relief credit		04-27-2020	-\$2,400.00		
766	Credit to your account		04-27-2020	-\$500.00		

04-15-2020

\$2,900.00

290	Additional tax assessed 79254-999-05099-0	20201505	04-27-2020	\$0.00
971	Notice issued		04-27-2020	\$0.00
766	Tax relief credit		01-18-2021	-\$1,200.00
766	Credit to your account		01-18-2021	-\$600.00
846	Refund issued		01-04-2021	\$1,800.00
290	Additional tax assessed 79254-999-05055-0	20205302	01-18-2021	\$0.00
766	Credit to your account		04-15-2021	-\$1,000.00
766	Credit to your account		04-15-2021	-\$52.00
971	Notice issued		04-19-2021	\$0.00
570	Additional account action pending		04-19-2021	\$0.00
571	Resolved additional account action		04-26-2021	\$0.00
846	Refund issued		04-13-2021	\$3,803.00
971	Amended tax return or claim forwarded for processing		05-02-2021	\$0.00
977	Amended return filed 43277-524-57783-1		05-02-2021	\$0.00
766	Credit to your account		04-15-2021	-\$1,348.00
290	Additional tax assessed 17254-623-05047-1	20213205	08-30-2021	\$0.00
971	Notice issued		08-30-2021	\$0.00
846	Refund issued		08-18-2021	\$1,361.25
776	Interest credited to your account		08-30-2021	-\$13.25
971	Amended tax return or claim forwarded for processing		09-14-2021	\$0.00
977	Amended return filed 07277-001-88888-1		09-14-2021	\$0.00
764	Earned income credit		04-15-2021	-\$1,378.00
290	Additional tax assessed 29254-445-06361-2	20220705	03-07-2022	\$0.00
971	Notice issued		03-07-2022	\$0.00
846	Refund issued		02-28-2022	\$1,413.33
776	Interest credited to your account		03-07-2022	-\$35.33
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 Apr.15, 2021 RECEIVED DATE: \$0.00 REMITTANCE: EXEMPTION NUMBER: 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: IDENTITY THEFT PERSONAL ID NUMBER: 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:
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:  OTHER INCOME:  SCHEDULE EIC SE INCOME PER COMPUTER:  SCHEDULE EIC EARNED INCOME PER COMPUTER:  SCH EIC DISQUALIFIED INC COMPUTER:  QUALIFIED BUSINESS INCOME DEDUCTION:  F8995 QUALIFIED BUSINESS INCOME DEDUCTION COMPUTER:  PRIMARY ECONOMIC IMPACT PAYMENT:  SECONDARY ECONOMIC IMPACT PAYMENT:  SCHOLARSHIP FELLOWSHIP GRANT:  TOTAL INCOME:  \$55	\$0.00 \$0.00 6,872.00 \$0.00 \$0.00 1,450.00 1,450.00 \$0.00
Adjustments to Income	
EDUCATOR EXPENSES: EDUCATOR EXPENSES PER COMPUTER: RESERVIST AND OTHER BUSINESS EXPENSE: HEALTH SAVINGS ACCT DEDUCTION: HEALTH SAVINGS ACCT DEDUCTION PER COMPTR: MOVING EXPENSES: F3903: SELF EMPLOYMENT TAX DEDUCTION: SELF EMPLOYMENT TAX DEDUCTION PER COMPUTER: SELF EMPLOYMENT TAX DEDUCTION PER COMPUTER: SELF EMPLOYMENT TAX DEDUCTION PER COMPUTER: SELF-EMP HEALTH INS DEDUCTION: SELF-EMP HEALTH INS DEDUCTION: EARLY WITHDRAWAL OF SAVINGS PENALTY: ALIMONY PAID SSN: ALIMONY PAID SSN: ALIMONY PAID: SCHOLARSHIP FELLOWSHIP EXCLUDED: IRA DEDUCTION: IRA DEDUCTION PER COMPUTER: STUDENT LOAN INTEREST DEDUCTION: STUDENT LOAN INTEREST DEDUCTION PER COMPUTER: STUDENT LOAN INTEREST DEDUCTION VERIFIED: TUITION AND FEES DEDUCTION PER COMPUTER: STUDENT LOAN INTEREST DEDUCTION: STUDENT LOAN INTEREST DEDUCTION VERIFIED:  TUITION AND FEES DEDUCTION PER COMPUTER: STUDENT LOAN INTEREST DEDUCTION VERIFIED:  STUDENT LOAN INTEREST DEDUCTION VERIFIED:  TUITION AND FEES DEDUCTION PER COMPUTER: STUDENT LOAN INTEREST DEDUCTION VERIFIED:  STUDING AND FEES DEDUCTION PER COMPUTER:  STORAL ADJUSTMENTS: ARCHER MSA DEDUCTION PER COMPUTER:  SADJUSTED GROSS INCOME: SADJUSTED GROSS INCOME: SADJUSTED GROSS INCOME:	\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00\$0.00
Tax and Credits	3,200,00
65-OR-OVER:  BLIND:  SPOUSE 65-OR-OVER:  SPOUSE BLIND:  STANDARD DEDUCTION PER COMPUTER:  TAX TABLE INCOME PER COMPUTER:  TAX TABLE INCOME PER COMPUTER:  TAXABLE INCOME:  TAXABLE INCOME:  S2  TAXABLE INCOME:  TAXABLE INCOME PER COMPUTER:  TAXABLE INCOME PER COMPUTER:  S2  TOTAL POSITIVE INCOME PER COMPUTER:  S5  TENTATIVE TAX:  S6  FORM 8814 ADDITIONAL TAX AMOUNT:  TAX ON INCOME LESS SOC SEC INCOME PER COMPUTER:	NONO 4,800.00\$0.00 4,405.00 4,405.00 4,405.00 1,404.00 2,536.00 2,536.00\$0.00

FORM 6251 ALTERNATIVE MINIMUM TAX:  FORM 6251 ALTERNATIVE MINIMUM TAX PER COMPUTER:  FOREIGN TAX CREDIT:  FOREIGN TAX CREDIT FER COMPUTER:  FOREIGN INCOME EXCLUSION PER COMPUTER:  FOREIGN INCOME EXCLUSION PER COMPUTER:  FOREIGN INCOME EXCLUSION PER COMPUTER:  FOREIGN INCOME EXCLUSION TAX PER COMPUTER:  EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT:  EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT:  EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT WERIFIED AMOUNT:  SICHILD & DEPENDENT CARE CREDIT:  CHILD & DEPENDENT CARE CREDIT:  CREDIT FOR ELDERLY AND DISABLED:  CREDIT FOR ELDERLY AND DISABLED PER COMPUTER:  SICHILD & DEPENDENT CARE CREDIT PER COMPUTER:  EDUCATION CREDIT:  SICHICATION CREDIT PER COMPUTER:  SICHILD AND OTHER DEPENDENT CREDIT PER COMPUTER:  SICHICATION CREDIT PER COMPUTER:  SICHILD AND OTHER DEPENDENT CREDIT:  SICHILD AND OTHER DEPENDENT CREDIT:  SICHILD AND OTHER DEPENDENT CREDIT:  FORM 8396 MORTGAGE CERTIFICATE CREDIT:  FORM 3800 GENERAL BUSINESS CREDITS PER COMPUTER:  SICHILD AND OTHER DEPENDENT CREDIT PER COMPUTER:  SICHICATION OF AND OTHER	
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HOUSEHOLD EMPLOYMENT TAXES:  HOUSEHOLD EMPLOYMENT TAXES PER COMPUTER:  IRC 453 TAX:  HEALTH CARE RESPONSIBILITY PENALTY:  HEALTH CARE RESPONSIBILITY PENALTY VERIFIED:  HEALTH COVERAGE RECAPTURE: F8885:  DEFERRED TAX SCH H SE:  MAX DEFERRED TAX PER COMPUTER:  SO.00  RECAPTURE TAXES:  TOTAL ASSESSMENT PER COMPUTER:  TOTAL TAX LIABILITY TP FIGURES:  TOTAL TAX LIABILITY TP FIGURES PER COMPUTER:  SO.00
Payments
FEDERAL INCOME TAX WITHHELD:
TOTAL PAYMENTS PER COMPUTER:
Refund or Amount Owed
REFUND AMOUNT:

THIRD PARTY DESIGNEE ID NUMBER:  AUTHORIZATION INDICATOR:
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 3 SSN:         STUDENT 3 NAME CNTRL:       STUDENT 3 SSN:         STUDENT 3 CREDIT AMOUNT:       \$2,500.00
PART II - LIFETIME LEARNING CREDITS
TOTL LIFETIM LRNING CR QLFD EXP:
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:BERNSTUDENT SSN:XXX-XX-2548ADJUSTED STUDENT QUALIFIED EXPENSES:\$2,099.00
Form 8962
Married Filing Separately Premium Tax Credit Exception Checkbox Indicator:0 FEDERAL POVERTY LEVEL CHECKBOX:

JANUARY MONTHLY PREMIUM:	
JANUARY MONTHLY PREMIUM SLCSP:	· ·
JANUARY MONTHLY ADVANCE PTC:	•
FEBRUARY MONTHLY PREMIUM:	
FEBRUARY MONTHLY PREMIUM SLCSP:	
FEBRUARY MONTHLY ADVANCE PTC:	
MARCH MONTHLY PREMIUM:	
MARCH MONTHLY ADVANCE PTC:	
APRIL MONTHLY PREMIUM:	· ·
APRIL MONTHLY PREMIUM SLCSP:	· ·
APRIL MONTHLY ADVANCE PTC:	
MAY MONTHLY PREMIUM:	
MAY MONTHLY PREMIUM SLCSP:	
MAY MONTHLY ADVANCE PTC:	\$0.00
JUNE MONTHLY PREMIUM:	\$0.00
JUNE MONTHLY PREMIUM SLCSP:	\$0.00
JUNE MONTHLY ADVANCE PTC:	
JULY MONTHLY PREMIUM:	· · · · · · · · · · · · · · · · · · ·
JULY MONTHLY PREMIUM SLCSP:	
JULY MONTHLY ADVANCE PTC:	
AUGUST MONTHLY PREMIUM:	
AUGUST MONTHLY PREMIUM SLCSP:	
AUGUST MONTHLY ADVANCE PTC:	
SEPTEMBER MONTHLY PREMIUM:	
SEPTEMBER MONTHLY PREMIUM SLCSP:	
OCTOBER MONTHLY PREMIUM:	
OCTOBER MONTHLY PREMIUM SLCSP:	·
OCTOBER MONTHLY ADVANCE PTC:	·
NOVEMBER MONTHLY PREMIUM:	
NOVEMBER MONTHLY PREMIUM SLCSP:	·
NOVEMBER MONTHLY ADVANCE PTC:	
DECEMBER MONTHLY PREMIUM:	·
DECEMBER MONTHLY PREMIUM SLCSP:	\$599.00
DECEMBER MONTHLY ADVANCE PTC:	
TOTAL PREMIUM TAX CREDIT:	•
NET PREMIUM TAX CREDIT:	\$2,646.00

This Product Contains Sensitive Taxpayer Data