

# Welcome to your personal Federal Income Tax account!

In order to better serve you, you can now do the following by logging on to your account:

- File an extension and/or make an estimated tax account
- File your federal tax return
- View your filed tax returns
- Track your refunds
- View open and closed audits and tax bills
- View all contacts with the IRS
- Contact the IRS via email
- Get a start on completing other forms
- Request transcripts/view documents submitted by other parties

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Address:  
221 Baker Street,  
Albany, NY 12205

[Update](#)

Phone Number:  
518-000-9999

[Update](#)

Email Address:  
JDoe@taxdesign2016.com

[Update](#)

### Authorized Representatives:

- Jerry Mousse +
- Tom Catt -
  - Power of Attorney
  - 2010-2014

## Filing Snapshot

Tax Year	Forms Filed	Date Filed	Payment	Refund	Notes
2015	Form 4868 (extension)	4/10/2016	\$500.00	\$0.00	An extension of time to file your return does not grant you any extension of time to pay your taxes.
2014	Form 1040	9/15/2015	\$0.00	\$3,500.00	Partial refund issued on 11/7/2015.
2013	Form 1040	4/30/2014	\$2,000.00	\$0.00	Paid \$2,000 on 4/30/14.
2012	Form 1040	4/15/2013	\$0.00	\$1,500.00	Full refund issued on 5/3/2013.

## Audits/Bills

Tax Year	Assessment/Notice ID	Total Billed	Current Balance	Notes
2013	CP503	\$500.00	\$0.00	Paid balance on 8/9/2014

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## File an Extension to File

Tax Year	File Extension?	Status
2015	YES/NO	Extension Filed
2014	YES/NO	No Extension Filed

## Make an Estimated Tax Payment

Tax Year	Enter Payment Date	Amount Paid	Notes
2015	4/10/2016	\$500.00	Paid \$500 with extension
2014			



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The following is from your prior year's return. Click in each box to make changes. If you are married at the end of the year and filing a joint return, enter your spouse's name and social security number.

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning		mm/dd	2015, ending	mm/dd	20	yy	See separate instructions.
Your first name and initial	Last name		Your social security number				
JOHN	DOE		000-00-9909				
If a joint return, spouse's first name and initial	Last name		Spouse's social security number				
Home address (number and street). If you have a P.O. box, see instructions.						Apt. no.	▲ Make sure the SSN(s) above and on line 8c are correct.
221 BAKER STREET							
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).							Presidential Election Campaign
City		State	ZIP code	Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.			<input type="checkbox"/> You <input type="checkbox"/> Spouse
ALBANY		NY	12205				
Foreign country name		Foreign province/state/county		Foreign postal code			



If your name or your spouse's name changed in the last year, notify the Social Security Administration before you file your return. If you don't, your refund will be delayed.

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The following is from your prior year's return. Click to make changes.

- Filing Status
- 1  Single
  - 2  Married filing jointly (even if only one had income)
  - 3  Married filing separately. Enter spouse's SSN above and full name here.  First  Last
  - 4  Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here  and SSN
  - 5  Qualifying widow(er) with dependent child



## Single

Single is the filing status to use if none of the others apply. Use it if you weren't married at the end of 2015, and aren't claiming a dependent or living with your child.

## FAQs

Joint Return or Separate Return?

What if I'm separated?

What if I just got divorced?

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Click in each box to make changes. The following is from your prior year's return.

## Exemptions

6a  Yourself. If someone can claim you as a dependent, do not check box 6a

b  Spouse First

Last

c Dependents:

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input type="checkbox"/> if child under age 17 qualifying for child tax credit (see instructions)
			▼	<input type="checkbox"/>
			▼	<input type="checkbox"/>
			▼	<input type="checkbox"/>
			▼	<input type="checkbox"/>

If more than four  
dependents, see  
instructions and  
check here

Add

d Total number of exemptions claimed

Boxes checked  
on 6a and 6b } 1  
No. of children  
on 6c who:  
- lived with you  
- did not live with  
you due to divorce  
or separation  
(see instructions)  
Dependents on 6c  
not entered above

Add numbers on  
lines above ▶

1

## FAQs

Who qualifies as a dependent?

What if my former spouse and I  
have an agreement to claim our  
child in alternate years?

Can I get a dependency  
exemption for someone else's  
child?



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Enter Your Income-click on each line for an explanation

Income	7	8a	8b	9a	9b	10	11	12	13	14	15a	15b	16a	16b	17	18	19	20a	20b	21	22	
7	Wages, salaries, tips, etc. Attach Form(s) W-2																					80,000
8a	Taxable interest. Attach Schedule B if required	Add																				
b	Tax-exempt interest. Do not include on line 8a																					
9a	Ordinary dividends. Attach Schedule B if required	Add																				
b	Qualified dividends																					
10	Taxable refunds, credits, or offsets of state and local income taxes																					
11	Alimony received																					
12	Business income or (loss). Attach Schedule C or C-EZ Sch C Add Taxpayer C-EZ Add Spouse C-EZ Add																					
13	Capital gain or (loss). Attach Sch D. If not required, check here																					
14	Other gains or (losses). Attach Form 4797 Add																					
15a	IRA distributions	15a										b Taxable amount	15b									
16a	Pensions and annuities	16a										b Taxable amount	16b									
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E Add																					
18	Farm income or (loss). Attach Schedule F Add																					
19	Unemployment compensation																					
20a	Social security benefits																					
21	Other income. List type and amount																					
22	Combine the amounts in the far right column for lines 7 through 21. This is your total income																					80,000



Form	Item and Box in Which It Should Appear	Where To Report
W-2	Wages, tips, other compensation (box 1)	Form 1040, line 7
	Allocated tips (box 8)	See <i>Wages, Salaries, Tips, etc.</i>
	Dependent care benefits (box 10)	Form 2441, Part III
	Adoption benefits (box 12, code T)	Form 8839, line 20
	Employer contributions to an Archer MSA (box 12, code R)	Form 8853, line 1
	Employer contributions to a health savings account (box 12, code W)	Form 8889, line 9
	Uncollected social security and Medicare or RRTA tax (box 12, code A, B, M, or N)	See the instructions for Form 1040, line 62

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## My Filed Tax Returns

Tax Year	Forms Filed	Date Filed
<u>2015</u>	Form 4868	4/14/2016
<u>2014</u>	Form 1040	9/15/2015
<u>2013</u>	Form 1040, Schedule A	4/30/2014
<u>2012</u>	Form 1040, Sch A, Sch C, Form 8283	4/15/2013

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Tax Year	Forms Filed	Date Filed
<u>2015</u>	Form 4868	4/14/2016
<u>2014</u>	Form 1040	9/15/2015
<u>2013</u>	Form 1040, Schedule A	4/30/2014
<u>2012</u>	Form 1040, Sch A, Sch C, Form 8283	4/15/2013

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## 2014 Tax Return

Social Security Number	XXX-XX-9909
Name(s) shown on return	John Doe
Address on return	221 Baker Street, Albany, NY 12205
Filing Date	9/15/2015
Forms Filed	1040
Filing Status	Single
Exemption Number	1
IRS Adjustments	Adjusted tax withheld
Adjustment Date	10/30/2015
Refund	\$3,500
Refund Date	11/7/2015

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## 2014 TAX RETURN-PAGE 2

1040 LINE #	1040 LINE	PER RETURN	PER IRS
7	WAGES, SALARIES, TIPS, ETC	75,000	75,000
8A	TAXABLE INTEREST INCOME: SCH B	0	0
8B	TAX-EXEMPT INTEREST	0	0
9A	ORDINARY DIVIDEND INCOME: SCH B	0	0
9B	QUALIFIED DIVIDENDS	0	0
10	REFUNDS OF STATE/LOCAL TAXES	0	0
11	ALIMONY RECEIVED	0	0
12	BUSINESS INCOME OR LOSS (Schedule C)	0	0
13	CAPITAL GAIN OR LOSS: (Schedule D)	0	0
14	OTHER GAINS OR LOSSES (Form 4797)	0	0
15A	TOTAL IRA DISTRIBUTIONS	0	0
15B	TAXABLE IRA DISTRIBUTIONS	0	0
16A	TOTAL PENSIONS AND ANNUITIES	0	0
16B	TAXABLE PENSION/ANNUITY AMOUNT	0	0
17	RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E)	0	0
18	FARM INCOME OR (LOSS) (SCHEDULE F)	0	0
19	UNEMPLOYMENT COMPENSATION	0	0
20A	SOCIAL SECURITY BENEFITS	0	0
20B	TAXABLE SOCIAL SECURITY BENEFITS	0	0
21	OTHER INCOME	0	0
22	TOTAL INCOME	75,000	75,000

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## 2014 TAX RETURN-PAGE 3

1040 LINE #	1040 LINE	PER RETURN	PER IRS
39A	BORN BEFORE 1/2/1951 AND/OR BLIND	0	0
39B	SPOUSE ITEMIZES OR DUAL STATUS ALIEN	N/A	N/A
40	ITEMIZED DEDUCTIONS OR STANDARD DEDUCTION	6,300	6,300
42	EXEMPTIONS	4,000	4,000
43	TAXABLE INCOME	64,700	64,700
44	TAX	12,038	12,038
45	ALTERNATIVE MINIMUM TAX	0	0
46	EXCESS ADVANCE PREMIUM TAX CREDIT	0	0
47	ADD LINES 44, 45, AND 46	12,038	12,038
48	FOREIGN TAX CREDIT	0	0
49	CREDIT FOR CHILD AND DEPENDENT CARE EXP	0	0
50	EDUCATION CREDITS	0	0
51	RETIREMENT SAVINGS CONTRIB. CREDITS	0	0
52	CHILD TAX CREDIT	0	0
53	RESIDENTIAL ENERGY CREDITS	0	0
54	OTHER CREDITS	0	0
55	TOTAL CREDITS	0	0
56	SUBTRACT LINE 55 FROM 47	12,038	12,038

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## 2014 TAX RETURN-PAGE 4

1040 LINE #	1040 LINE	PER RETURN	PER IRS
39A	BORN BEFORE 1/2/1951 AND/OR BLIND	0	0
39B	SPOUSE ITEMIZES OR DUAL STATUS ALIEN	N/A	N/A
40	ITEMIZED DEDUCTIONS OR STANDARD DEDUCTION	6,300	6,300
42	EXEMPTIONS	4,000	4,000
43	TAXABLE INCOME	64,700	64,700
44	TAX	12,038	12,038
45	ALTERNATIVE MINIMUM TAX	0	0
46	EXCESS ADVANCE PREMIUM TAX CREDIT	0	0
47	ADD LINES 44, 45, AND 46	12,038	12,038
48	FOREIGN TAX CREDIT	0	0
49	CREDIT FOR CHILD AND DEPENDENT CARE EXP	0	0
50	EDUCATION CREDITS	0	0
51	RETIREMENT SAVINGS CONTRIB. CREDITS	0	0
52	CHILD TAX CREDIT	0	0
53	RESIDENTIAL ENERGY CREDITS	0	0
54	OTHER CREDITS	0	0
55	TOTAL CREDITS	0	0
56	SUBTRACT LINE 55 FROM 47	12,038	12,038
57	SELF-EMPLOYMENT TAX	0	0
58	UNREPORTED SOCIAL SECURITY AND MEDICARE TAX	0	0
59	ADDITIONAL TAX	0	0
60A	HOUSEHOLD EMPLOYMENT TAXES	0	0
60B	FIRST-TIME HOMEBUYER CREDIT REPAYMENT	0	0
61	HEALTH CARE	0	0
62	TAXES	0	0
63	TOTAL TAX	12,038	12,038

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1040 LINE #	1040 LINE	PER RETURN	PER IRS
64	FEDERAL INCOME TAX WITHHELD	19,538	15,538
65	2015 ESTIMATED TAX PAYMENTS	0	0
66A	EARNED INCOME CREDIT	0	0
66B	NONTAXABLE COMBAT PAY	0	0
67	ADDITIONAL CHILD TAX CREDIT	0	0
68	AMERICAN OPPORTUNITY CREDIT	0	0
69	NET PREMIUM TAX CREDIT	0	0
70	AMOUNT PAID WITH REQUEST FOR EXTENSION	0	0
71	EXCESS SOCIAL SECURITY	0	0
72	CREDIT FOR FEDERAL TAX ON FUELS	0	0
73	CREDITS	0	0
74	TOTAL PAYMENTS	19,538	15,538
75	OVERPAID	7,500	3,500
76A	AMOUNT REFUNDED TO YOU		3,500
76B	ROUTING NUMBER		NOT APPLICABLE
76C	TYPE		NOT APPLICABLE
76D	ACCOUNT NUMBER		NOT APPLICABLE
77	AMOUNT TO APPLY TO 2016 ESTIMATED TAX		0
78	AMOUNT YOU OWE		0
79	ETIMATED TAX PENALTY		0
	THIRD PARTY DESIGNEE		JERRY MOUSSE
	PIN		NOT APPLICABLE

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## 2014 Tax Return

Social Security Number	XXX-XX-9909
Name(s) shown on return	John Doe
Address on return	221 Baker Street, Albany, NY 12205
Filing Date	9/15/2015
Forms Filed	1040
Filing Status	Single
Exemption Number	1
IRS Adjustments	Adjusted tax withheld
Adjustment Date	10/30/2015
Refund	\$3,500
Refund Date	11/7/2015

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## 2014 CONDENSED TAX RETURN

1040 LINE #	1040 LINE	PER RETURN	PER IRS
7	WAGES, SALARIES, TIPS, ETC	75,000	75,000
22	TOTAL INCOME	75,000	75,000
37	ADJUSTED GROSS INCOME	75,000	75,000
40	ITEMIZED DEDUCTIONS OR STANDARD DEDUCTION	6,300	6,300
42	EXEMPTIONS	4,000	4,000
43	TAXABLE INCOME	64,700	64,700
44	TAX	12,038	12,038
47	ADD LINES 44, 45, AND 46	12,038	12,038
56	SUBTRACT LINE 55 FROM 47	12,038	12,038
63	TOTAL TAX	12,038	12,038
64	FEDERAL INCOME TAX WITHHELD	19,538	15,538
74	TOTAL PAYMENTS	19,538	15,538
75	OVERPAID	7,500	3,500
76A	AMOUNT REFUNDED TO YOU		3,500
	THIRD PARTY DESIGNEE		JERRY MOUSSE
	PIN		NOT APPLICABLE

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REFUND STATUS			
TAX YEAR	REQUEST RECEIVED	STATUS	NOTES
2015	N/A	N/A	Return not filed.
2014	9/15/2015	Refund issued on 11/7/15	Refund adjusted.
2013	N/A	N/A	Return has balance due.
2012	4/15/2013	Refund issued on 5/3/2013	Full refund issued.



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## Tax Audits

Tax Years	Open/Close	Result
No audit found.		

## Tax Bills

Tax Years	Assessment/Notice ID	Total Billed	Current Balance	Notes
2013	CP503	\$500.00	\$0	Paid balance on 8/9/2014.

[Pay Balance](#)

Pay taxes due.

[Payment Agreement](#)

Find out if you're eligible to make payment arrangements on the amount of tax you owe if you can't afford to pay all of it at one time.

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## Contacts with the IRS

Date of Contact	Contact Type	IRS Rep	Comments
4/10/2016	Mail	Processing	Rec'd Form 4868 & \$500.
11/20/2015	Phone	Agent 999999	Jerry Mousse, 3rd party designee, called regarding adjusted refund. Advised rep that refund was adjusted b/c of amount of tax withheld. Rep looked at return and W2 and agreed a mistake was made.
11/7/2015	Mail	Processing	Issued refund of \$3,500.

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Instead of calling or visiting an IRS location, you can now email us your questions!

## Email the IRS

Enter Tax Year

Enter Question/Comment

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## How can your tax return help you?

The following list are some of the areas where your tax return will assist you:

Click & Learn

- Free Application for Federal Student Aid (FAFSA)

Click & Learn

- Supplemental Nutrition Assistance Program (SNAP)

Click & Learn

- Student Loans

Click & Learn

- Health Insurance

Click & Learn

- Buying a Home

Click & Learn

- State and Local Tax

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## State and Local Tax

Based on your home address and income, you may have a filing obligation with New York State. The starting point of the NYS tax return is your Federal Adjusted Gross Income. Go to [www.tax.ny.gov](http://www.tax.ny.gov) to see if you have a filing obligation. If you have a filing obligation click on the link below and the information per your federal return will populate in the NYS tax form.

Tax Year	NYS Full Year Resident	NYS Nonresident and Part-Year Residents
2015	<a href="#">IT-201 Full Year NYS Resident</a>	<a href="#">IT-203 Nonresident and Part-Year Resident Income Tax Return</a>
2014	<a href="#">IT-201 Full Year NYS Resident</a>	<a href="#">IT-203 Nonresident and Part-Year Resident Income Tax Return</a>
2013	<a href="#">IT-201 Full Year NYS Resident</a>	<a href="#">IT-203 Nonresident and Part-Year Resident Income Tax Return</a>
2012	<a href="#">IT-201 Full Year NYS Resident</a>	<a href="#">IT-203 Nonresident and Part-Year Resident Income Tax Return</a>



# My Federal Tax Information



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Welcome, Doe-John  
(XXX-XX-9909)

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The following are statements received from various  
entities. Click on form to view.

Year	Form	Issuer
2015	W-2	ABC Co.
2015	1095-A	Mktplce
2014	W-2	ABC Co.
2014	W-2	XYZ Co.

## Request Transcript

- REQUEST** Tax Return Transcript
- REQUEST** Tax Account Transcript
- REQUEST** Record of Account Transcript
- REQUEST** Wage and Income Transcript
- REQUEST** Verification of Non-filing Letter